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A FUND-RAISING STRATEGY FOR VISITOR CENTERS ALASKA REGION

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RECREATION SHORT COURSE
CLEMSON UNIVERSITY, CLASS OF 1990

APRIL 8,1991

This paper was prepared as a student project in partial fulfillment of the requirements of the Professional Development for Outdoor Recreation Management Program at Clemson University. It in no way reflects USDA Forest Service policy nor are the opinions expressed those of anyone other than the author.

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ABSTRACT

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Title: A Fund-Raising Strategy for Visitor Centers, Alaska Region

Abstract:

A fund-raising strategy is developed toward the establishment of a fund-raising organization in support of Forest Service visitor centers, Alaska Region. An introduction to fund-raising is presented to give an orientation to a comprehensive fund-raising campaign. The situation surrounding this targeted effort is addressed - goals and objectives of the organization, Alaska's economy and tourism industry, visitation to the visitor center's and current operations, site and facility conditions.

Existing authorities supporting fund-raising efforts are displayed. A tentative fund-raising organizational structure is recommended. Prospective funding sources are identified. Alternatives to establishing a fund-raising organization and a tentative fund-raising goal are presented. Fund-raising consultants are discussed and evaluated for the expertise they can offer.

Recommendations and an Implementation Plan for establishing a fund-raising organization are presented.

Keywords: Visitor Centers, Foundations, Fund Raising, Partnerships, Subsidies

A FUND-RAISING STRATEGY FOR VISITOR CENTERS, ALASKA REGION

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EXECUTIVE SUMMARY

Title: A Fund-Raising Strategy for Visitor Centers, Alaska Region

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Summary:

The visitor centers in the Alaska Region are key elements in the State of Alaska's economic picture. The growing tourism industry provides the State a means to diversify their oil dependant economy. The Begich, Boggs Visitor Center (BBVC) at Portage Glacier, 55 miles from Anchorage, and the Mendenhall Glacier Visitor Center (MGVC), just outside of Juneau are the number one and three most visited sites by all visitors to the State. These facilities provide a developed and guaranteed recreation opportunity featuring the unique physical and cultural attraction of the natural environment. The Forest Service Information Center, in Juneau's convention center, is heavily visited and provides information - a critical element in contributing to customer satisfaction. The Southeast Alaska Visitor Information Center, to be located in Ketchikan, will most likely attract extremely high numbers of visitors given its location at the first port along the "Inside Passage", the second most visited attraction in Alaska.

Sufficient operation, maintenance and development funds are not available to run these facilities. The establishment of a fund-raising organization is strategized to solicit and accept contributions from the individuals and organizations interested and dependant on the visitor center's quality operations.

Through the Chief's National Recreation Strategy, we have been charged with finding creative and imaginative ways to work with people to achieve the outdoor recreation potential of the National Forests. We must look for funding sources outside the Federal budget and leverage limited Federal dollars by attracting partners to get the total recreation job done.

The characteristics of Alaska's economy and tourism industry are convincing evidence that the Alaska Region's visitor centers are key elements in the State's economic picture. The State and the tourism industry have an interest in these facilities that must be vested.

The current hours and seasons of operation at the visitor centers do not meet the demand for visitation of these facilities. Although open for the peak use season between May and September, staff reports additional demand by independent travelers, school groups, and residents, enough to warrant additional hours of operation. Lacking funds is identified as the limiting factor. Staffing costs are minimized to the highest degree possible by use of volunteers. Operating expenses are not easily reduced.

The multi-million dollar capital investments made in the MGVC and BBVC are not being protected with adequate funds of operation, maintenance, and development dollars. Critical maintenance is being deferred and capital investments are not being made to maintain a quality experience for visitors.

Authorities are in place to encourage and solicit direct contributions of cash, charitable trust funds, property gifts, gifts from estates, grants, and other awards of funds. The primary use of these funds must be for the general public benefit and cannot involve a conflict of interest. The structural elements of a fund-raising organization and two alternatives for its establishment is discussed and evaluated.

Two alternatives for establishing a fund-raising organization for Alaska's visitor centers will be evaluated:

1. Expand existing relationship with the Alaska Natural History Association to establish a fund-raising organization (foundation) to support operation, maintenance, and development of visitor centers.

2. Establish an independent fund-raising organization. This organization could develop a foundation for fund-raising efforts as well as promote the interpretive and educational materials and services as an interpretive association.

Professional fund-raising consultants are available to assist in our fund-raising efforts. They bring special training and experience to the planning and management of a fund-raising plan. Based on extensive research and interviews, they predict the feasibility of obtaining fund-raising goals and address the elements of a comprehensive fund-raising plan. The use of a consultant will be considered.

Recommendations for implementation of a fund-raising campaign and associated action items and assigned responsibilities are presented. With a positive fund-raising climate in place - leadership commitment, thorough communications, and a strong viability for fund-raising success, the Alaska Region will be primed to support and contribute to the success of this effort. Our visitor centers will ultimately provide a higher quality recreation opportunity and our customers will be satisfied.

INTRODUCTION

The visitor centers in the Alaska Region are key elements in the State of Alaska's economic picture. The growing tourism industry provides the State a means to diversify their oil dependant economy. The Begich, Boggs Visitor Center at Portage Glacier, 55 miles from Anchorage, and the Mendenhall Glacier Visitor Center, just outside of Juneau are the number one and three most visited sites by all visitors to the State. These facilities provide a developed and guaranteed recreation opportunity featuring the unique physical and cultural attraction of the surrounding natural environment. The Forest Service Information Center, in Juneau's convention center, is heavily visited and provides information - a critical element in contributing to customer satisfaction. The Southeast Alaska Visitor Information Center, to be located in Ketchikan, will most likely attract extremely high numbers of visitors given its location at the first port along the "Inside Passage", the second most visited attraction in Alaska.

Sufficient operation, maintenance and development funds are not available to run these facilities. The purpose of this project is to strategize for the establishment of a fund-raising organization to solicit and accept contributions from the individuals and organizations interested and dependant on the visitor center's quality operations.

Statement of Purpose

The purpose of this project is to build a strategy to establish a fund-raising organization to support the operation, maintenance and development of visitor centers in the Alaska Region.

The process of fund-raising will be discussed to present the comprehensive nature of a fund-raising campaign. Our approach to fund-raising must be professional and systematic. This paper will complete much of the up-front analysis required for an effective and successful fund-raising effort.

The situation surrounding this effort will be analyzed to verify the importance and role the visitor centers play in Forest Service organizational goals and in the tourism industry of the State of Alaska. This will be the premise for pursuing a fund-raising campaign and the basis for determining prospective donors.

Existing authorities will be presented that support and encourage fund-raising efforts. The goals and objectives of the Forest Service are found to be clearly compatible with this project. The structural elements of a fund-raising organization and two alternatives for its establishment will be discussed and evaluated. Fund-raising professionals can contribute to the success of our efforts. Their role in conducting a Feasibility Study and providing fund-raising services is considered.

Recommendations for implementation of a fund-raising campaign and associated action items and assigned responsibilities will be presented. The commitment to and support of this plan by the leadership in the Alaska Region will be sought.

This project will take the following steps to place the Alaska Region in readiness for contracting the services of a professional fund-raiser:

1. Present the mission, goals and objectives of the organization to which the fund-raising will contribute.

2. Analyze the economy in the State of Alaska and the role tourism plays in this economy. Analyze visitors to Alaska and to the Alaska Region's visitor centers.

3. Analyze the visitor center operations and site and facility conditions.

4. Consider prospective sources of funding. Evaluate the alternatives for establishing a fund-raising organization. Set a tentative fund-raising goal.

5. Evaluate the use of consultants and their role in conducting a Feasibility Study and providing fund-raising services.

6. Recommend an implementation plan for a fund-raising campaign, including a timetable of actions and assignments of specific responsibilities.

LITERATURE REVIEW

A review of available literature for fund-raising, provided adequate references for the general fund-raising process and the tentative organizational structure of a non-profit fund-raising group. The literature also provided information on the role a consultant can play in determining the feasibility of fund- raising success and in providing fund-raising services. (Young, 1981; Broce, 1980; Smith, 1985)

Virtually no literature was found on fund-raising applied to public agency needs. One reference presented the fund-raising process in the context of municipal park, recreation and conservation operations needs. Successful case studies are discussed. (Palent) Discussions with project coordinator and fund-raising consultants along with the review of Feasibility Studies for two successful fund-raising efforts at the Cradle of Forestry in America and Land Between the Lakes, provided insights into the direct application of fund-raising campaigns. (CFAIA, 1972; Staley/Robeson/Ryan/St. Lawrence, Inc., 1983)

A literature review for information on Alaska's tourism industry found a number of references. The State of Alaska's *Alaska Visitor Statistic Program II* provided a thorough reference for a statewide overview of visitors. (McDowell) The *Five-Year Strategic Plan for Tourism* presented the importance of tourism in Alaska. (State of Alaska, Department of Commerce and Economic Development, Division of Tourism)

DISCUSSION

I. INTRODUCTION TO FUND-RAISING

Overall, fund-raising is a selling plan, a sophisticated public relations plan. Effective fund-raising will communicate that limited resources are available to manage our facilities and that through contributed funds, the scope and quality of service will improve. Funds-raising will reach out to prospective donors and encourage a spirit of self help and responsibility by involving an interested public in the management of the National Forests.

Why do people give? Individual motives for giving vary widely. Understanding giving motives will help us target our fund-raising efforts. One of the common reasons for giving is attributed to sheer habit and imitation of others. Giving can be a pattern built up by community practices and social pressures. The need for increased self esteem and recognition from others can also provide a motivation for giving. Additionally, intimate contact with a specific need and desire to remedy it can also be a strong motive for giving.

Almost universally, gifts are not made if they are not asked for. An established fund-raising organization provides the means to solicit these gifts. It is important to be comfortable with asking for gifts and not be judgemental toward the giver.

The demand for the charitable dollar is intense and competition is very keen. Looking at who makes charitable donations in the United States, it is surprising to find that donations by individuals make up the majority of gifts. Bequests, foundations and corporations gifts represent only a small proportion. The following table from "The Chronicle of Philanthropy, Giving USA" shows charitable donations in 1988. These numbers represent their best estimates based on available information.

GIVING IN 1988 (in billions)

Sources:		Uses:	
Individuals	$86.70	Religion	$48.21
Bequests	$ 6.79	Education	$ 9.78
Foundations	$ 6.13	Health	$ 9.52
Corporations	$ 4.75	Human Service	$10.49
		Arts/Humanities	$ 6.82
		Public/Social	$ 3.02
		Other	$16.53

A continued increase in giving is seen over the years, with religious, social-action, and the arts and cultural organizations showing the biggest increases in the year 1988. Unfortunately, adequate information does not exist to make an estimate of gifts made for outdoor natural resources.

The process of fund-raising requires a comprehensive effort of upfront planning and strategic fund-raising. To be successful, fund-raising efforts must be done professionally and systematically, and overall, be goal-oriented and productive.

1. The organization's broad and strategic goals and objectives must be defined.

2. The fund-raising goals are determined using the organization's goals as a guideline and deciding upon the kind of fund-raising program to be conducted and the amounts to be sought.

3. Prospect identification and evaluation begins to define the market of prospective funding sources. Minimally, they may include individuals, institutions, corporations and foundations, federal, state and local agencies. An evaluation of the approximate giving range and the area of interest of each identified prospect should be made.

4. A case statement is developed that succinctly tell what the organization is, what it plans to do or become and why it deserves support. The statement should convey a positive presentation of the organization and a convincing statement of the goals of the fund-raising program. It must be shown why and how the donor's gift will make a difference.

5. A timetable sequencing fund-raising efforts should be developed to define periods devoted to major and minor gift solicitations. Targeted dates must be scheduled for reaching fund-raising goals.

6. The solicitation of gifts is accomplished by identifying leadership roles for developing and soliciting gifts and the targeted gift structure. A gift structure should be developed outlining special and matching gifts, deferred gift payments, etc.

7. Stewardship is essential in maintaining a long-term commitment to the fund-raising organization. Donors must be systematically recognized and appreciated. A scale and strategy of recognition should be developed to properly emphasize gifts of various magnitudes and ensure continued support.

Associated with the fund-raising process, it is essential that the attitudes within the Alaska Region be primed to support and contribute to the effort. The fund-raising firm of Staley/Robeson/Ryan/St. Lawrence, Inc. which conducted a Feasibility Study for fund-raising at the Tennessee Valley Authority's Land Between-the-Lakes, speaks of establishing a positive fund-raising climate. Their experience has shown that through leadership commitment, thorough communications and with a strong viability for success, a fund-raising climate will be in place.

- The organization and staff must have the respect and confidence of those from whom we seek support.

- There must be a belief that there are genuine needs that ought to be met by fund raising and that the operations at the visitor centers will be improved by doing so.

- The potential contributors must be sufficiently informed about the visitor centers and the Forest Service (FS), interested in our programs, and concerned about the need to come forward with an enthusiastic response, both in terms of giving and working for the effort.

- There must be adequate potential within the visitor center's and the Forest Service's constituency to provide the levels of giving which are viewed as necessary.

- There must be a group of key administrators, volunteer leaders and other pivotal friends who are able and willing to assume principal giving and leadership roles which will set the pace for participation by all others who will be asked to take part in the effort.

The process of fund-raising and the proper climate must be addressed and in place in order to build a financial support vehicle for the Alaska Region's visitor centers. Without a comprehensive approach to fund-raising, our efforts in this endeavor will be ineffective and demoralizing. Allan Arlett, Executive Director of the Canadian Centre for Philanthropy, points out that the easiest part of fund-raising is actually asking for the money. The hard part is getting the fund-raising organization in shape, communicating a mission or purpose that meets a need, and developing a program that will identify, inform and involve those whom you feel are most likely to support the cause. Only after these steps are completed should funds be requested.

II. INTRODUCTION TO THE VISITOR CENTERS IN THE ALASKA REGION

The Mendenhall Glacier Visitor Center (MGVC)

The Mendenhall Glacier extends down from the Juneau Icefield into the Mendenhall Valley, home to the majority of Juneau's residents. The visitor center and surrounding area have long been a scenic attraction for residents and visitors of Alaska's Capital City. Its location affords visitors a unique opportunity to view a glacier at close range and to study first-hand the effects of glaciation on the landscape. The popular "Fireside Series" is hosted at the center and provides a weekly series of evening presentations on natural resource related activities and management.

When the center was constructed in 1962, it was designed to serve primarily as an observatory for the anticipated 30,000 visitors annually. In the ensuing years, many changes have take place on the site. Most dramatically, visitation has increased to at least six times that amount, with 204,000 visits reported in 1990. Visitation to the site itself is estimated at approximately double this count. The center is the third most visited attraction in the State of Alaska. All trends indicate that these numbers will continue to rise.

To accommodate the increase visitation, capital improvements have been made to the base facilities, with increased parking, a contact station, viewing shelter, waiting shelter and additional toilet facility. Plans are currently underway for the expansion of the visitor center itself.

The Begich, Boggs Visitor Center at Portage Glacier (BBVC)

Portage Glacier and Portage Lake are found in the Chugach Mountains, 55 miles southeast of Anchorage. This center and surrounding area have long been a scenic attraction for residents and visitors to Anchorage. Its location affords visitors a panoramic view of the glacier and its iceberg-choked lake and provides the opportunity to study glacial morphology.

The center was constructed in 1986 and has now completed five full seasons of use. The center is designed for 400,000 visits annually and is close to reaching that, with 380,000 visits in 1990. Visitation to the site itself is estimated at approximately double this count. The center is the most visited attraction in the State of Alaska. All trends indicate that these numbers will continue to rise.

Forest Service Information Center (FSIC)

This center is located in the City of Juneau's convention center. The center provides an essential information service to visitors, provides Natural Resource Education and hosts public meetings and natural resources related talks. It's theme of "sharing Nature's bounty" is featured in exhibits about historical use of forest resources. It receives a constant flow of traffic during the summer visitor season and caters to summer visitors interested in trip planning, gathering advice and counsel from staff. It is the principal center for taking public use cabin reservations for the region. It was constructed in 1982 and had approximately 73,000 visits in 1990. Visitation is expected to increase.

Southeast Alaska Visitor Information Center (SEAVIC)

The center will be constructed within the next few years. It is one of the four Alaska Lands Public Information Centers (APLIC). The other APLIC's are found in Anchorage, Fairbanks and Tok. Although an interagency facility, the FS will be responsible for its operation and maintenance.

This center will be a staging area for visitors to the State travelling north along the Inside Passage (the second most visited attraction in Alaska). It will provide information on the attractions and recreational opportunities available throughout Southeast Alaska. The center will also provide interpretive and educational displays and programs covering the natural and cultural resources found on public lands in the region.

The facility is designed at 22,000 square feet and will accommodate 400 persons per hour.

III. SITUATION ANALYSIS

A. Goals and Objectives

Fund-raising builds partnerships. The direct involvement of the public by contributing funds establishes a stronger ownership and participation in the management of the visitor centers. Through partnerships, goals are reached by sharing responsibilities. The FS cannot get the job done alone. Even in 1907, Gifford Pinchot saw this involvement by the public as crucial.

> National Forest are made for and owned by the people. They should also be managed by the people. ...What the people as a whole want will be done. To do it, it is necessary that the people carefully consider and plainly state just what they want and then take a very active part in seeing that they get it.

1. National Forest Recreation Goals and Objectives.

The National Recreation Strategy (NRS), launched by the Chief in 1988, introduced a new challenge of finding creative and imaginative ways to work with people to achieve the outdoor recreation potential of the National Forests. The primary emphasis was customer satisfaction.

The goals and objectives of this strategy included:

- Look for funding sources outside the Federal budget. Implement the strategy through positive change, without being dependant on more Federal dollars.

- Modernize facilities. Design quality recreation opportunities. Provide interpretation and environmental education. Showcase the special places National Forests have to offer.

- Nurture and rely on strong, fruitful partnerships. Build upon the success of the Challenge Cost-share program and expand it as far as you can.

The Chief's NRS specifically targets partnerships as the preferred way of providing better customer service and expanding recreational opportunities.

- Seek partnerships with outdoor recreation user groups and with other recreation providers - Federal, State, local and private sector, to help develop or maintain recreation facilities.

- Leverage limited Federal dollars by attracting outside funding and support from potential partners to get the total recreation job done.

2. Alaska Region's Recreation Goals and Objectives.

The Alaska Region has developed our own recreation strategy tiering from the Chief's NRS and committing our efforts to its full implementation. We have especially emphasized the contribution the National Forests make to the economic diversity of Alaska. Partnerships with local and State interests are critical in ensuring quality recreation opportunities that contribute to the local and state economies.

3. Visitor Center Goals and Objectives.

The visitor centers in the Alaska Region are modern facilities, providing quality recreation opportunities. Their goal is to provide interpretive, educational and information services. They showcase the special places of the National Forests. They strive to communicate glacial phenomenon, natural resources and history, and further the identity and support of the FS.

B. Analysis of Alaska's Economy and Tourism Industry

The characteristics of Alaska's economy and tourism industry are convincing evidence that the Alaska Region's visitor centers are key elements in the State's economic picture. The State and the tourism industry have an interest in these facilities that must be vested.

The economy of the State of Alaska is dominated by its oil and gas industry. The state estimates that over 80% of their revenue comes from these resources. This one-sided dependence has encouraged the state to seek diversification of its economy. Tourism ranks third to oil production and commercial fishing in terms of gross dollar volume (Five-Year State Plan for Tourism). Tourism is therefore an industry of increasing economic importance.

In a recently completed survey of the Alaska visitor for the summer of 1989, some key information was collected that will verify assumptions and guide future decisions related to the tourism industry. (Department of Commerce & Economic Development, Division of Tourism, State of Alaska; McDowell Group - Contractor)

For the summer of 1989, visitor arrivals, expenditures and patterns were surveyed and evaluated by taking arrival counts, making personal random arrival surveys, and distributing visitor expenditure and opinion surveys.

Some of the following findings are especially relevant to National Forest management in the Alaska Region:

Visitation:

The total number of visitors to Alaska totalled 559,279, with four out of five visitors traveling for pleasure purposes. Only one out of five visitors traveled to Alaska for business related reasons. Half of those were combining business and pleasure. The total number of vacation/ pleasure visitors has grown 19% since the summer of 1985.

Alaska's most popular attractions are nearly the same as those in 1985. The Portage Glacier and the Mendenhall Glacier remain the number one and three most visited sites by all visitors. The "Inside Passage", the water route up through Southeast Alaska and the Tongass National Forest, is the second most visited attraction in Alaska.

Anchorage, Juneau, and Ketchikan are the communities most visited. In southeast, Juneau remains the hub of the tourism flow (81%) with Ketchikan gaining in visitation (74%). In southcentral, Anchorage hosts 97% of all visitors to this region. Anchorage with 346,100 visits, Juneau with 246,700 visits, and Ketchikan with 227,400 visits.

Repeat visitation - vacation/pleasure visitors are more experienced with Alaska than in previous years. One fifth of all vacation/pleasure visitors have been to Alaska in the past five years, compared to 15% in 1985.

The average visitor's intended length of stay in 10.9 nights which has declined from 12.7 nights in the summer of 1985. This trend is compatible with the national trends toward short but more frequent vacations.

Travel Methods:

Travel type: more than half (55%) of vacation/pleasure visitors in summer of 1989 travel on a package trip, slightly less than the summer of 1985.

The majority of the vacation/pleasure visitor uses the cruise ship as their major transportation mode. An increase is occurring in domestic area travel. Travel by highway and by State ferry is also increasing steadily.

Demographics:

Age: vacation/pleasure visitors are getting younger, 50 years old on the average compared to 54 years old in the summer of 1985. One third of visitors are retired.

Vacation/pleasure visitors originate predominately from the U.S. (81%). Canadian visitors represent 12% and the overseas visitor, 7%. Travelers from both Canada and overseas countries are becoming a greater share of Alaska visitors with overseas market doubling since 1986.

Expenditures:

Alaska visitors during the summer of 1989, spent a total of $932.5 million on travel to/from and within the state. Of this, $304.1 million (37%) was spent directly by visitors on goods and services in Alaska. Overall, this represents a slight increase from the summer 1986. There are substantial additional economic benefits of tourism in Alaska which were not covered because they are not classified as direct consumer expenditures.

The McDowell Group report also developed marketing implications from the survey report. They point to how important the visitor centers are to the tourism industry. The FS can draw from these implications to influence our operations and better meet visitor needs.

Marketing Implications include:

- Maintain the quality of the Alaska visitor experience. Preserve the natural environment, which provides most of the State's main attractions, as well as enhance the man-made means for experiencing them.

- To succeed with the European and Japanese markets, in particular, premium attractions must be offered. The oversees market is more discriminating and demands higher quality.

- Visitor information centers are considered critical elements in the industry. Complete, top quality information services must be provided to contribute to visitor satisfaction. Inconsistencies of hours and seasons of operations, signage, and orientation to a single attraction, rather than State wide attractions, should be reduced between centers.

C. Analysis of Visitation to Visitor Centers, Alaska Region

RVD'S/VISITS
(average stay = ½ hour)

	1986	1987	1988	1989	1990
MGVC*	4,600/ 110,300	4,775/ 114,600	4,792/ 115,000	7,708/ 185,000	8,500/ 204,000
BBVC*	33,220/ 661,000	24,072/ 385,100	24,072/ 385,200	28,500/ 475,000	21,100/ 380,000
FSIC	3,544/ 40,129	3,011/ 36,129	3,935/ 47,224	3,949/ 47,385	6,043/ 72,518

SEAVIC: design capacity - 400 persons per hour
(Average stay = 1 hour)

* Visitation counts are to centers only. It is estimated that visits to the sites are double this count, with average stay in the area increasing to 1 1/2 hours.

Forest Service visitor centers are the most visited sites in Alaska. They are critical facilities since they provide recreational opportunities that directly support the tourism industry. The industry is dependent on the guaranteed, intense, and quality experience these facilities provide.

Additionally, Alaska residents make up a large segment of the visitors to these facilities. While supporting the tourism industry, they have a personal interest in these facilities. They look to these facilities to provide continued quality, interpretive, and recreational opportunities at the sites that cater to their repeat visitation.

D. Visitor Centers - Operations, Site and Facility Condition Assessment

1. Operations - Staffing and Operating Expenses

The current hours and seasons of operation at the visitor centers do not meet the demand for visitation of these facilities. Although open for the peak use season between May and September, staff reports additional demand by independent travelers, school groups, and residents, enough to warrant additional hours of operation. Lacking funds is identified as the limiting factor. Staffing costs are minimized to the highest degree possible by use of volunteers. Operating expenses are not easily reduced.

Visitor Center	Operating Costs (FY 90)	Hours and Season of Operation
MGVC	$298,730	**Current operating season**: mid-May-September, 9am-6:30pm, daily. October-May, 10am-5pm, weekends. Fireside programs: January-March, 6:30-9:30pm, fridays. **Desired operating season**: May 1-September, 9am-6:30pm, daily. October-April, 10am-5pm, saturday-monday. Thanksgiving and Christmas vacation periods, 10am-5pm. Continue Fireside programs.
BBVC	$250,000	**Current operating season**: approximately May 23-September 9, 9am-7pm, daily. September 10-November 1, 10am-6pm, wed-sun. November 2-December 31, 11am-4pm, weekends, April 4-May 20, 10am-6pm, wednesday-sunday. Thanksgiving and Christmas vacation periods, 11am-4pm. Closed January-April, open one week in February for Fur Rendezvous. **Desired operating season**: current operating season and January-April, 11am-4pm, weekends.
FSIC	$174,495	**Current operating season**: approximately May 12-September 8, 8am-5pm, daily. September 9-May 11, 8am-5pm, weekends. **Desired operating season**: May 1- October 15, 8am-5pm, daily.
SEAVIC	$320,500 (estimate)	**Desired operating season**: May-September, 9am-7pm, daily. October-April, 10am-6pm, tuesday-saturday.

2. Site and Facility Condition Assessment

The multi-million dollar capital investments made in the MGVC and BBVC are not being protected with adequate funds of operation, maintenance, and development dollars. Critical maintenance is being deferred and capital investments are not being made to maintain a quality experience for visitors.

Engineering facility management recommends that at a minimum, an annual maintenance allocation of approximately three percent of current value be made toward facilities in order to protect investments. Currently, less than one percent of current value is being directed toward these facilities. The resulting backlog of maintenance needs is growing cumulatively and will ultimately require major reconstruction to correct deferred maintenance.

Appendix A outlines the scheduled MGVC and BBVC facility maintenance needs and the minimal progress being made toward accomplishment.

Maintenance needs for the FSIC is accomplished by the City of Juneau, with the FS contributing 10.8 percent of the total annual operation and maintenance expenses for the convention center. Annual payments to the City have been running approximately $22,000.

IV. FUND-RAISING

A. Authorities

Authorities are in place to encourage and solicit direct contributions of cash, charitable trust funds, property gifts, gifts from estates, grants, and other awards of funds. The primary purpose must be for the general public benefit and cannot involve a conflict of interest (FSM 1584.03). Contributions are considered charitable for tax purposes if made to the FS for exclusively public purposes (26 stat 170). Fund raising is a partnership between the donor and the FS and is a new and creative means to accomplish common goals and objectives.

Cooperative Funds Act of June 30, 1914 (16 USC 498) Ref: FSM 1584.11.

- Work must be related to investigations, protection or improvement of National Forest lands.
- Only on lands with National Forest Status.
- FS must do work by either force account or procurement contract.
- Contributions must be voluntary.
- Overhead can be waived.
- Funds must be deposited before work begins.
- Funds must be accounted for separately by type of donation.
- Surpluses must be refunded to the depositor.

Acceptance of Gifts Act of October 10, 1978 (7 USC 2269) Ref: FSM 1584.16.

- Can accept, receive, hold and utilize and administer gifts, bequests,or devises of real and personal property to carry out functions.
- Acceptance of gift/donations may not be conditional upon endorsement of the donor's firm or product.

Granger-Thye Act of April 24,1950, (16 USC 572)Ref: FSM 1584.13

- Can accept contributions for the administration, protection, improvement, reforestation, or such other kinds of work the Forest Service is authorized to do on lands under its jurisdiction for the benefit of the public.

Volunteers in the National Forest Act of 1972, (16 USC 558)Ref:FSM 1830

- May accept the services of individuals without compensation, although incidental expenses may be provided for.

B. Fund-Raising Organization - Foundations

The aim of fund-raising for the visitor centers in Alaska Region is to solicit large donations and contributions. An established Foundation lends credibility and longevity to fund-raising efforts. Foundations are established under a non-profit fund-raising organization. The fund-raising organization can then provide sizable charitable support to the agency's programs by obtaining gifts from philanthropic groups and the public, managing the funds to the greatest possible advantage, and ultimately dispensing funds to the agency.

The organizational structure of foundations is typically:

1. Established as a 501 (c)(3) not-for-profit corporation to successfully solicit philanthropic gifts. Gifts are seen as charitable for tax purposes.

2. Has articles of incorporation that are compatible with the mission, goals, and objectives of the agency.

3. Is governed by a board of directors, selected based upon their support of the mission, goals, and objectives of the agency.

4. Has an executive committee, which operates for the Board of Directors, and can act on behalf of the Board when the full Board cannot convene.

5. May have other standing and special committees as necessary.

6. Has a fundamental and succinct set of by-laws in place stating that the Board has the authority to raise funds and enter into contracts in support of the agency.

7. Operates by agreement with the agency to enter into the task of seeking gift support for specific agreed upon purposes. The agreement should include: commitments of staff and facility support by the agency, an annual work plan and budget prepared by the fund-raising organization, and the agency's conditions and restrictions for accepting gifts.

8. Has an executive director (non-government) hired by the fund-raising organization with the agency's concurrence, who is an ex-official member of the Board and its Executive Committee. The Director is responsible for planning and executing the fund programs and acting as the principle liaison with the agency.

9. Allows the fund-raising organization to cultivate, solicit, and receive gifts and turn them over to the agency, but not have any authority to administer projects.

10. Has a program of membership support requiring annual dues and providing benefits.

11. May need financial assistance from the agency for a short initial period in order to cover start up costs.

Advantages to establishing a foundation lie principally in the non-profit organization's ability to manage collected funds to the greatest possible advantage, an option not available to the Forest Service as a governmental agency. Foundations also foster donor confidence. Donors feel that they are giving to a permanent institution with a clearly stated purpose. They feel that there is a higher degree of accountability of their gifts being used for the intended purpose because of the independence of the foundation from the agency. An advantage to a foundation is that gifts are given to a single cause, rather than to a specific project, allowing more flexibility with their use. Through a foundation, an "arm's length" relationship is created between the agency and the donors, discouraging any expectations of special services.

Foundations can have disadvantages as well. A strong fund-raising organization's Board of Directors can be viewed as a threat to the agency. Isolation and lack of communication can occur between the Board and the agency. It can be perceived that funds raised are sunken into the foundation's operating costs. These problems can most readily be avoided by the agency's commitment to and good communications with the fund-raising organization.

C. Prospective Funding Sources

Legitimate prospects must be identified and evaluated for their gift amounts and programs they will support. The visitor center's constituents are easily targeted. The best prospects should be concentrated on since most of the the gift income will come from a small percentage of the donors.

Appendix B contains a listing of references for prospective funding sources.

A partial listing of the prospective funding sources for the visitor centers include:

- Tour companies - Holland America Westours, Princess Cruises, Windstar Cruises, Clipper Cruise Lines, World Explorer Cruises, Alaska Sightseeing Tours, Grayline Tours, etc.
- Local businesses - outfitter and guides, air taxi charters, etc.
- Major industries in Alaska - oil, timber, fishing, tourism, etc.
- Alaska residents, particularly those in Juneau, Anchorage, and Ketchikan.
- Alaska visitors.
- City and Borough of Juneau, Anchorage, and Ketchikan. A bed/lodging tax is in place in Juneau (7%) and Anchorage (8%) to capture transient visits to these communities. Considerable funds have been collected and are directed principally at convention and visitor bureaus efforts at promoting tourism and developing and enhancing tourist attractions.

- State and Federal economic assistance. The "1990 Catalog of Federal Domestic Assistance", and the "Economic Development Resource Guide", fifth edition. A number of potential programs applicable to fund-raising efforts for the visitor centers are available to nonprofit organizations:

    a. Grants for Public Works and Development Facilities, United States Department of Commerce. Assists in the creation of public facilities needed to initiate and encourage creation of permanent jobs.

    b. Tourist Attraction Development Matching Grants. Alaska Department of Commerce and Economic Development, Division of Tourism. To develop, preserve or improve existing local tourist attractions.

    c. Visitor Information Services Matching Grant Program. Alaska Department of Commerce and Economic Development, Division of Tourism. To construct or operate local visitor information centers and help defray the costs fo design, printing and distributing visitor information materials.

- Foundations.

    a. Comprehensive source books are available to reference available and awarded foundation grants.

    b. The National Forest foundation was enacted during the 101th congress, Public Law 101-593. Its purpose includes the encouragement, acceptance and administration of private gifts of money, and of real and personal property for the benefit of, or in connection with the activities and services of the Forest Service.

- Corporations and Corporate Foundations. Prior to approaching a corporation, it should be ascertained that the corporation is in a financial position to give. Corporations can have many motives for giving but often center on the tax write-off advantage and good public relations that can be generated from the contribution. Often they give to old, established, conservative and traditional fund raising campaigns.

D. Alternatives to Establishing a Fund-Raising Organization

Two alternatives for establishing a fund-raising organization for Alaska's visitor centers exist:

1. Expand existing relationship with the Alaska Natural History Association to establish a fund-raising organization (foundation) to support operation, maintenance, and development of visitor centers.

2. Establish an independent fund-raising organization. This organization could develop a foundation for fund-raising efforts as well as promote the interpretive and educational materials and services as an interpretive association.

Alternative 1

Interpretive associations can accept donations in support of National Forest activities. They must have the appropriate wording in their Articles of Incorporation (FSH 2390.1), and the donations can only be used for the purpose for which the association was established.

The Alaska Natural History Association (ANHA) is an interpretive association serving Federal and State agencies in Alaska. It was incorporated in November, 1970, and was formed for the primary purpose of "supporting the educational and scientific programs of Federal, other governmental agencies, and non-profit organizations concerned with the conservation, preservation and interpretation of natural, historical and cultural resources of the State of Alaska".

The Participating Agreement between the FS and ANHA, ratified March 30, 1987, sets forth the responsibilities of the two parties. The agreement determines that is desirable for ANHA to promote the education, historic, scientific, and other values of the National Forests, and assist with educational and interpretive activities. The agreement sets the responsibilities of the FS to include providing ANHA with necessary sales and facilities, incidental utility services, and general maintenance and repair services for government owned buildings. Responsibilities of ANHA include selling interpretive and educational items directly related to the interpretive and educational theme of the forest and the FS.

The purpose of ANHA, as stated in their Articles of Incorporation, can be seen to extend association's support to visitor center operation, maintenance and development, as well as to interpretive and educational sales and services. Previous discussions with ANHA have concluded with ANHA resolute - they have not seen their purpose extending to operations, maintenance and development of facilities. An amendment to the Participating Agreement would be necessary to clarify that association funds would support interpretive sales, services and facilities.

To develop a fund-raising program through ANHA, a separate committee should be formed to handle fund-raising efforts separate from the promotion of interpretive and educational services and sales.

Recent preliminary discussions with Craig Renkert, Chairman of the Board of ANHA regarding a fund-raising campaign, have been very encouraging. Renkert has recently taken the chairman position and under his guidance, ANHA's intentions will be to strive to better serve their clients. He is sympathetic to the Forest Service's changing needs and hopes that ANHA can meet them by becoming more flexible with their organizational philosophies and principals.

Advantages to this alternative are found in ANHA's established position as a nonprofit organization serving natural resource agencies. Their thirty year history has developed a network of clients and contacts, prospective donors to a fund-raising program.

Disadvantages to this alternative are in overcoming the sometimes tenuous relationship the FS has had over the years with ANHA. Poor communications has resulted in misunderstandings and resolute decisions regarding appropriate overhead assessments and the use of funds for operation and maintenance needs.

Alternative 2

An alternative to pursuing a fund-raising program with ANHA would be to pursue establishment of an independent nonprofit organization. The most efficient approach to working with a new organization would be to develop their charge beyond just a fund-raising program. This organization could organize a foundation for fund-raising efforts as well as promote the interpretive and educational services of an interpretive association. Our relationship with ANHA would be discontinued.

The advantages to this alternative lie in the parental relationship that would be developed between the FS and the organization as we worked together to develop the purpose of establishment. It would be assured that funds raised could be directed toward operation, maintenance and development of facilities as well as interpretive and educational materials and programs.

The disadvantages to this alternative are found in the extensive up-front time necessary to help establish the organization, recruit the Board, build Articles of incorporation and a Partnership Agreement. The transitional period before the organization became fully functional would be a stress on the interpretive materials sales programs. The new organization would need time to become effective as it built its client and network contacts.

E. Goals of Fund-Raising

The goal of fund-raising is not only a financial objective but an integral part of a campaign strategy. The goal communicates to prospective donors the material challenge and corresponding commitment necessary to accomplish it.

The goal should not be so high so that failure is predictable. The goal should be an achievable amount to maintain enthusiasm and long-term participation by the fund-raising organization and by the donors.

A tentative goal for funds supporting the visitor centers could be one percent of the facilities' total current value. The FS can then readily "match" the funds with normal appropriations and direct an appropriate funding level toward operating and maintenance needs.

V. CONSULTANTS

Only by developing and implementing a comprehensive and sophisticated fund-raising scheme will we be competitive for any substantial contributions to the effective and efficient operation of the Alaska Region's visitor centers. State of the art techniques should be used to most readily enable success. Professional fund-raising consultants are available to assist in our efforts. They bring special training and experience to the planning and management of a fund-raising plan. Based on extensive research and interviews, they predict the feasibility of obtaining fund-raising goals and address the elements of a comprehensive fund-raising plan.

Appendix C includes materials to assist in interviewing and selecting the appropriate fund-raising consultant.

A. Feasibility Study

A Feasibility Study conducted by a professional fund-raising consultant is an important step in assuring fund-raising success. The feasibility study is a distinct step, separate from the fund-raising efforts themselves. Through the study, the attitudes of potential donors toward the organization and its fund-raising objectives is assessed. A timetable for fund-raising efforts and a targeted gift structure is recommended. A series of personal interviews is a basic first step to the study and targets major contributors - corporate and individuals. The Feasibility Study offers objective advise on whether to go ahead with fund-raising efforts and at what level, or whether to take additional preparatory steps first.

The study can be contracted with or without commitment to employ the consultant to conduct the fund-raising campaign.

B. Fund-Raising

Fund-raising efforts can be managed and directed by consultants. Their involvement can be complete, having a lead role in all aspects of fund-raising or their role can be minimal, providing only intermittent advice and counsel. Services can include:

- preparation of detailed campaign plan
- assistance with recruitment of key volunteers
- providing orientation and guidance to all volunteers
- plan execution for cultivation and solicitation of prospective donors
- development of a database on all prospective donors
- assistance with contacts at major foundations, corporations and individuals.
- preparation of major proposals
- continuous communications and timely progress reports
- market research
- preparation of the case statement

C. Success Story and Lessons Learned at the Cradle of Forestry in America

The FS, R-8 - Cradle of Forestry in America (CFA) has had a successful working relationship with the Cradle of Forestry Interpretive Association (CFAIA) since March, 1972. The CFAIA's purpose is to assist in the educational, historical and interpretive activities within the Cradle of Forestry. Amendments to the agreement in 1985 expanded the CFAIA's role beyond their original purpose to participate in the operation, maintenance and development of interpretive and educational facilities.

In January, 1988, the FS contracted with a consultant to study the feasibility for success of a capital campaign to raise $7 million for continued improvement and development of the CFA. The study, completed in May, 1988, recommended that the planned development be separated into phases and that a capital campaign should be embarked on with a goal of approximately $2 million for phase 1.

In 1989, the CFAIA, secured a fund-raising consultant to assist CFAIA and the FS in planning for a capital campaign of approximately $2.6 million and providing public relations and capital campaign management for the duration of the fund drive.

Currently, the capital campaign has raised approximately $1 million in donated charitable funds. Overall, the CFA's fund-raising efforts have been a tremendous success. Discussions with the FS project coordinator, provides some invaluable advice:

Feasibility Study:

> The Feasibility Study was absolutely critical for professionally determining possible success. They didn't want to fail once committed. Interviews all but secure donations. The Forest Service contracted the feasibility study for a cost of approximately $25,000.
>
> Through the Feasibility Study, they found that there were misperceptions to be dealt with. Prospective donors felt that by making a donation, they would take on some of the negative pressure directed toward the FS related to timber practices. The CFA,therefore, geared their solicitation to emphasis how the donor would benefit by their participation.
>
> A membership campaign was recommended, but separate from the primary fund-raising campaign. A membership drive will not contribute significantly toward the goal but is critical to building a support network and giving visibility to the organization's goals.

From Feasibility Study to Fund-Raising Campaign:

> A critical mistake was made by going with a different consultant to help with the campaign. Much information and familiarity is gained by the study consultant that is not necessarily reflected in the study report. The natural resource nature of this campaign was quite different than the typical fund-raising efforts found, such as hospitals, schools, etc. Because of this, the study consultant underestimated the complexity of considering a campaign of this nature. The new consultant, used for the campaign itself, had a similar unfamiliarity to overcome before they became fully effective.
>
> A critical mistake was also made by not moving ahead with the campaign immediately after the study. The CFA waited almost a year after the study before contracting campaign services. The donor interest became very stale. It is necessary to have up-front commitment to contract both efforts in a timely manner.
>
> It is best to go with a single contract for both the Feasibility Study and the fund-raising campaign. The contract should make fund-raising services contingent on FS confirmation to go ahead.

Fund-Raising Campaign:

The CFAIA contraced the services of a fund-raising consultant. In the Request for Proposals for campaign services, the CFAIA asked for a range of proposals:

1- intermittent visits to check FS status of fund-raising effort and offer advice.
2- 50% involvement in campaign; a more active role.
3- consultant to take lead role for the length of campaign.

Cost for these services is typically ten percent of fund-raising goal. A mid-range proposal for services was selected for approximately $180,000, for 18 months. This amount was arrived at through negotiations with CFAIA providing more support services, office space, etc.

Payment for services rendered came out of solicited donations. From the annually approved operating budget, a payment schedule was arrived at of $8,000 per month plus travel expenses incurred. Funds were very short initially since the campaign didn't really generate any funds for the first year. CFAIA secured a local bank to handle the solicited funds and with that agreement, loans were granted to cover initial payments to contractor. Donations have been used throughout the campaign toward operation and maintenance needs at the CFA and were later replaced with sales receipts and fee collections from on-going CFAIA operations.

Solicitation in pairs was most effective. A team approach more readily tracks the reception by the donor and allows the discussion to cater to that interest. FS attended most solicitations and their confidence grew after a few months.

They targeted large goals from specific prospects, however, most donors would only meet that goal through deferred payments, annually, over four to five years. They also found that corporations were more willing to make scheduled contributions toward operating and maintenance needs rather than toward capital investments.

Staffing. It was necessary to have a FS coordinator assigned full time to the campaign. The CFAIA hired a staff assigned full time to the campaign's support work - typing, reservations, research on prospective donors and foundations, etc.

The CFAIA established a Capital Campaign Committee using the four members of the Executive Committee. Their offices were reassigned for this new effort.

The Forest felt that this effort was not fully supported by the agency. Success is more readily achieved when there is complete commitment in the fund-raising campaign by all levels of the organization. The FS Washington Office and Regional Office can provide many of the key contacts.

Appendix D includes a copy of the Request for Proposal for the CFA Capital Campaign Services, November 1988; Feasibility Study, May 1988; Request for Proposal for CFA Capital Campaign Feasibility Study, January 1988.

VI. Recommendations and Implementation

It is recommended that the FS pursue the establishment of a fund-raising organization to solicit and manage donated funds for the improved operation, maintenance, and development of the visitor centers in the Alaska Region.

We should expand our existing relationship with ANHA to jointly launch a fund-raising campaign. It must first be confirmed that ANHA is willing to participate in the operation, maintenance and development of the visitor centers. A professional fund-raiser should then be contracted to conduct a Feasibility Study and potentially provide the fund-raising services as well. The consultant should consider the FS's relationship with ANHA in recommending a fund-raising organization and will most probably suggest that ANHA form a foundation arm to support the campaign.

1. Confirm the commitment of the Alaska Region to fund-raising efforts to support visitor centers.

   WHO: Director RCWR
   WHEN: September 1991

2. Pursue an amendment to the Participating Agreement with ANHA to expand the association's objective to include participating in the operation, maintenance and development of interpretive and educational facilities.

   WHO: RO RCWR
   WHEN: September 1991

3. Contract the services of a professional fund-raiser to conduct a Feasibility Study to determine the success of a fund-raising campaign, the recommended organizational structure within a nonprofit organization, and the recommended fund-raising goal. The RFP should also include fund-raising services as an option upon FS confirmation.

   WHO: RO RCWR
   WHEN: November 1991

4. Issue confirmation of fund-raising campaign services.

   WHO: RO RCWR
   WHEN: Upon positive feasibility notice by contractor.

5. Begin fund-raising efforts.

   WHO: RO RCWR
   WHEN: Upon positive feasibility notice by contractor.

CONCLUSION

Through the Chief's National Recreation Strategy, we have been charged with finding creative and imaginative ways to work with people to achieve the outdoor recreation potential of the National Forests. We must look for funding sources outside the Federal budget and leverage limited Federal dollars by attracting partners to get the total recreation job done.

They are key elements in the State's economic picture. The State and the tourism industry are dependant on their optimum operations. Our visitor centers are not receiving sufficient operation, maintenance and development funds to optimally run these facilities.

The establishment of a fund-raising organization will enable the solicitation of large donations and contributions that will be managed to the greatest possible advantage and ultimately be directed toward the visitor centers. A professional consultant can best help us define a comprehensive and sophisticated fund-raising scheme. With a positive fund-raising climate in place - leadership commitment, thorough communications, and a strong viability for fund-raising success, the Alaska Region will be primed to support and contribute to the success of this effort. Our visitor centers will ultimately provide a higher quality recreation opportunity and our customers will be satisfied.

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APPENDIX A - Site and Facility Condition Assessment Reports

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MANAGEMENT SYSTEM
<<<<< SITE INVENTORY REPORT 100 >>>>>

191. SITE LAST UPDATE : 03/28/90

SITE NUMBER: (10)(05)(03)229-SITE SITE NAME: MENDENHALL VISITOR CENTER 05 NUMBER OF INVENTORIED BUILDINGS ON SITE: 2

* SITE IDENTIFICATION *

1. REGION : 10 ALASKA
2. FOREST : 05 CHATHAM
3. DISTRICT : 03 JUNEAU
4. SITE NUMBER : 229
5. SITE NAME : MENDENHALL VISITOR CENTER
6. SITE ID : 05 OTHER SITES
7. STATE : AK
8. RIM NUMBER:

* SITE ACCESS *

11. DIST FROM SC : 9C MILES
12. ACCESS CONDITIONS : FLY-IN SITE
13. TRAVEL TIME FROM SC : 4C MINUTES
14. LATITUDE : --/--/--.-
15. LONGITUDE : ---/--/--.-

* SITE CHARACTERISTICS *

101. TOPOGRAPHY : SITE SLOPE
102. TIMBER STAND : OPEN
103. DRAINAGE : RAPIDLY DRAINS
104. SOIL CONDITION : LARGE COBBLES OR ROCK
105. SITE ELEVATION : 100 FEET MSL

* SITE COMMUNICATIONS *

121. COMMERCIAL TELEPHONE : YES
122. FOREST TELEPHONE : NO
123. RADIO TELEPHONE : NO
124. FOREST NET RADIO :
125. CENTRALIZED TV : NO
126. OTHER COMMUNICATIONS : NO

* SITE CLIMATOLOGY *

141. DEGREE HEATING DAYS : 9CCC
142. AVE ANNUAL PRECIP : 9C INCHES
143. MAXIMUM SNOW DEPTH : 4C INCHES

* SITE UTILITIES *

111. WATER SOURCE : WELL
112. WATER SYSTEM CLASS :
113. SEWAGE TREATMENT : CENTRALIZED SEPTIC
114. EFFLUENT DISPOSAL :
115. ELECTRIC POWER SOURCE : COMMERCIAL
116. ELECTRIC POWER DISTRIB : UNDERGROUND

* SITE USE *

131. AVE DAILY POPULATION :
132. USE PERIOD : MON

* SITE HAZARD STUDY *

161. STUDY COMPLETED :
162. DATE STUDY COMPLETE : --/--/--

* SITE MASTER PLAN *

151. LAND WITHDRAWAL AREA : ACRE
152. USABLE LAND AREA : ACRE
153. DATE SITE PLAN PREPARED : --/--/--
154. DATE SITE MASTER PLAN APPROVED : --/--/--

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MANAGEMENT SYSTEM
<<<<< FACILITY INVENTORY REPORT 101 >>>>>

291. FACILITY LAST UPDATE : 03/28/90

FACILITY NUMBER : (10)(03)(07)229-7654 SITE NAME : MENDENHALL VISITOR CENTER OS FACILITY NAME : GLACIER VISITOR CENTER

SITE IDENTIFICATION

1. REGION : 10 ALASKA
2. FOREST : 03 CHATHAM
3. DISTRICT : 03 JUNEAU
4. SITE NUMBER : 229
5. SITE NAME : MENDENHALL VISITOR CENTER

FACILITY IDENTIFICATION

201. BUILDING NUMBER : 7654
202. BUILDING NAME : GLACIER VISITOR CENTER
203. BUILDING TYPE : SERVICE
204. BUILDING SUBTYPE : VISITOR CENTER
205. BUILDING CAPACITY :
206. USE : RECREATION USE
207. BUILDING USE PERIOD : 12 MONTHS
208. DRAWING NUMBER :
209. FST CURRENT VALUE : $ 1,570,000

FACILITY CHARACTERISTICS

221. MAINTENANCE LEVEL : 3
222. YEAR CONSTRUCTED : 1962
223. CONSTRUCTION TYPE : FRAME
224. SIZE BASEMENT : 1340 SF
225. SIZE FIRST FLOOR : 1630 SF
226. SIZE SECOND FLOOR : 0 SF
227. SIZE THIRD FLOOR : 0 SF
GROSS AREA : 2950 SF
228. SIZE ATTACHED RESIDENTIAL GARAGE : 0 SF

FACILITY OPERATION & MAINTENANCE

241. O & M PLAN COMPLETED :

FACILITY HANDICAPPED ACCESS

251. HANDICAPPED ACCESS : YES

FACILITY HAZARD EVALUATION

261. LOCATED IN HAZARD AREA : NOT DETERMINED

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MANAGEMENT SYSTEM
<<<<< FACILITY INVENTORY REPORT 101 >>>>>

291. FACILITY LAST UPDATE : 03/28/90

FACILITY NUMBER : (10)(03)(03)2e8-1b21 SITE NAME : MENDENHALL VISITOR CENTER US FACILITY NAME : SEWER TREATMENT PLANT

* SITE IDENTIFICATION *

1. REGION : 10 ALASKA
2. FOREST : 03 CHATHAM
3. DISTRICT : 03 JUNEAU
4. SITE NUMBER : 229
5. SITE NAME : MENDENHALL VISITOR CENTER

* FACILITY IDENTIFICATION *

201. BUILDING NUMBER : 1b21
202. BUILDING NAME : SEWER TREATMENT PLANT
203. BUILDING TYPE : UTILITY
204. BUILDING SUBTYPE : OTHER UTILITY
205. BUILDING CAPACITY :
206. DST : OTHER DST
207. BUILDING USE PERIOD : 12 MONTHS
208. DRAWING NUMBER :
209. EST CURRENT VALUE : $ --,---,---

* FACILITY CHARACTERISTICS *

221. MAINTENANCE LEVEL : 3
222. YEAR CONSTRUCTED :
223. CONSTRUCTION TYPE : CONCRETE
224. SQ. BASEMENT : 0 SF
225. SIZE FIRST FLOOR : 0 SF
226. SIZE SECOND FLOOR : 0 SF
227. SIZE THIRD FLOOR : 0 SF
GROSS AREA : 0 SF
228. SIZE ATTACHED RESIDENTIAL GARAGE : 0 SF

* FACILITY OPERATION & MAINTENANCE *

241. O & M PLAN COMPLETE :

* FACILITY HANDICAPPED ACCESS *

251. HANDICAPPED ACCESS : NO

* FACILITY HAZARD EVALUATION *

261. LOCATED IN HAZARD AREA : NOT DETERMINED

1/1/91
Site Name: Mendenhall Visitor Center
Additional Buildings on site:

		Estimated Current Value
Viewing Shelter	4200 sq ft	$317,000
Restroom	1100 sq ft	$330,000
Waiting Shelter	550 sq ft	$105,000
Visitor Contact Station	150 sq ft	$ 88,000
Kiosk	n/a	$ 15,000

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM PAGE NO. : 1
<<<<< SITE & FACILITY CONDITION ASSESSMENT >>>>>

FACILITY NUMBER : (10)(03)(03)229-0000 DATE : 03/26/91

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM ELEM'T	TOTAL COST EST	ACCOMP DATE	FINAL COST	PRI
0	07/09/90 OZ	SITE -- MENDENHALL VISITORS CENT ER			0:	/	0:	0

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM PAGE NO. : 2
<<<<< SITE & FACILITY CONDITION ASSESSMENT >>>>>

FACILITY NUMBER : (10)(03)(03)229-1520 DATE : 03/26/91

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM ELEM'T	TOTAL COST EST	ACCOMP DATE	FINAL COST	PRI
0	11/25/85 OZ	MGVC UTILITY SYSTEMS, WATER AND SEWER, 20 YEAR LIFE	REC	5	0:	/	0:	0
1	11/25/85 OZ	REPAIR LEAK IN ROOF OF TREATMENT PLANT, 8 MH $400 OH $300	REC	G3	700:	/	0:	892
2	11/25/85 OZ	EXTERIOR PAINTING OF RAILINGS AND WOOD TRIM, 5 YEAR CYCLE, 8 MH $400 OH $300	REC	A3	700:	/	0:	902
3	11/25/85 OZ	MAINTENANCE OF EQUIPMENT IN TREATMENT PLANT, ANNUAL PV MAINTENANCE, 5TH YEAR OF CYCLE, 20 MH $1000 OH $750	REC	M2	1750:	/	0:	932
7	12/01/88 OZ	ITEM 6, EQUIPMENT PV MAINTENANCE, 4TH YEAR OF CYCLE, 20 MH $1000 OH $750	REC	M2	1750:	/	0:	922
8	12/01/88 OZ	ITEM 6, EQUIPMENT PV MAINTENANCE, 3RD YEAR OF CYCLE, 20 MH $1000 OH $750	REC	M2	1750:	/	0:	912
9	12/01/88 OZ	ITEM 6, EQUIPMENT PV MAINTERNANCE, 2ND YEAR OF CYCLE, 20 MH $1000 OH $750	REC	M2	1750:	/	0:	902
10	12/01/88 OZ	ITEM 6, EQUIPMENT PV MAINTENANCE, 1ST YEAR OF CYCLE, 20 MH $1000 OH $750	REC	M2	1750:	/	0:	892
11	12/01/88 OZ	TREATMENT PLANT OPERATION, 5TH YEAR OF CYCLE, 300 MH $8500, OH $6375	REC	M2	14375:	/	0:	932
12	12/01/88 OZ	ITEM 11, PLAT OPERATION, 4TH YEAR OF CYCLE, 300 MH $8500 OH $6375	REC	M2	14375:	/	0:	922
13	12/01/88 OZ	ITEM 11, PLANT OPERATION, 3RD YEAR OF CYCLE, 300 MH $8500 OH $6375	REC	M2	14875:	/	0:	912

FACILITY NUMBER : (10)(03)(03)229-1520 DATE : 03/26/91

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM ELEM'T	TOTAL COST EST	ACCOMP DATE	FINAL COST	PRI
14	12/01/88 OZ	ITEM 6, PLANT OPERATION, 2ND YEA R OF CYCLE, 300 MH $8500 OH $63 75	REC	M2	14875	/	0	902
15	12/01/88 OZ	ITEM 6, PLANT OPERATION, 1ST YEA R OF CYCLE, 300 MH $8500 OH $63 75	REC	M2	14875	/	0	892
16	12/01/88 OZ	MECHANICAL VENTILATION REPLACEME NT, 10 YEAR CYCLE, 8 MH $400 OH $300	REC	M2	700	/	0	922
21	12/01/88 OZ	SAFETY AND CONDITION SURVEY, 5TH YEAR OF CYCLE, ANNUAL INSPECTIO N, 4 MH $200 OH $150	REC	HS2	350	/	0	931
22	12/01/88 OZ	ITEM 20, SAFETY AND CONDITION SU RVEY, 4TH YEAR OF CYCLE, 4 MH $2 00 OH $150	REC	HS2	350	/	0	921
23	12/01/88 OZ	ITEM 21, SAFETY AND CONDITION SU RVEY, 3RD YEAR OF CYCLE, 4 MH $2 00 OH $150	REC	HS2	350	/	0	901
24	12/01/88 OZ	ITEM 21, SAFETY AND CONDITION SU RVEY, 2ND YEAR OF CYCLE, 4 MH $2 00 OH $150	REC	HS2	350	/	0	901
25	12/01/88 OZ	ITEM 21, SAFETY AND CONDITION SU RVEY, 1ST YEAR OF CYCLE, 4 MH $2 00 OH $150	REC	HS2	350	/	0	891
31	12/01/88 OZ	VANDALISM, 5TH YEAR OF CYCLE, ES T ANNUAL REPAIRS, 16 MH $800 OH $600	REC	G3	1400	/	0	932
32	12/01/88 OZ	ITEM 31, VANDALISM, 4TH YEAR OF CYCLE, 16 MH $800 OH $600	REC	G3	1400	/	0	922
33	12/01/88 OZ	ITEM 31, VANDALISM, 3RD YEAR OF CYCLE, 16 MH $800 OH $600	REC	G3	1400	/	0	902
34	12/01/88 OZ	ITEM 31, VANDALISM, 2ND YEAR OF CYCLE, 16 MH $800 OH $600	REC	G3	1400	/	0	902

FACILITY NUMBER : (10)(03)(03)229-1520 DATE : 03/26/91

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM ELEM'T	TOTAL COST EST	ACCOMP DATE	FINAL COST	PRI
35	12/01/88 OZ	ITEM 31, VANDALISM, 1ST YEAR OF CYCLE, 16 MH $800 OH $600	REC	G3	1400	/	0	892

FACILITY NUMBER : (10)(03)(03)229-3554 DATE : 03/26/91

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM ELEM'T	TOTAL COST EST	ACCOMP DATE	FINAL COST	PRI
0	11/25/85 OZ	MENDENHALL VISITOR CENTER, MENDENHALL GLACIER, JUNEAU, 20 YEARS	PROJ	5	0	/	0	0
1	12/01/88 OZ	ROOFING W.R. GRACE MEMBRANE SYSTEM, WHITE COATING REQUIRED EVERY 5 YEARS. REPLACEMENT MEMBRANE APPROX. 20 YEARS 2004, 16 MH $120 0 OH 900	REC	G3	2100	/	0	892
2	12/01/88 OZ	SAME AS ITEM 1, 5 YEAR CYCLE, 16 MH $1200 OH $900	REC	G3	2100	/	0	942
3	12/01/88 OZ	EXTERIOR PAINTING, 5 YEAR CYCLE, CONTRACT $8000 OH $600	REC	A3	14000	/	0	922
6	12/01/88 OZ	GROUNDS MAINTENANCE, LAWN, PARKING LOTS, TRASH, SNOW REMOVAL PARKING LOTS, WEED CONTROL, ANNUAL, 5TH YEAR OF CYCLE, MH $5000 OH $3750	REC	SB2	8750	/	0	942
7	12/01/88 OZ	ITEM 6, 4TH YEAR OF CYCLE, MH $5000 OH $3750	REC	SB2	8750	/	0	932
8	12/01/88 OZ	ITEM 6, 3RD YEAR OF CYCLE, MH $5000 OH $3750	REC	SB2	8750	/	0	922
9	12/01/88 OZ	ITEM 6, 2ND YEAR OF CYCLE, MH $5000 OH $3750	REC	SB2	8750	/	0	912
10	12/01/88 OZ	ITEM 6, 1ST YEAR OF CYCLE, MH $5000 OH $3750	REC	SB2	8750	/	0	902
11	12/01/88 OZ	GUTTERS AND DOWNSPOUTS REPLACEMENT, CAST IRON SCUPPERS, 3 MH $150 OH $110	REC	G3	260	/	0	932
12	12/01/88 OZ	RAILINGS, STAIRS AND STEPS, 10 YEAR CYCLE, 60 MH $5000 OH $3750	REC	SB2	8750	/	0	891
16	12/01/88 OZ	INTERIOR PAINTING, WALLS AND CEILINGS, 5 YEAR CYCLE, CONTRACT $10,000 OH $7500	REC	A3	17500	/	0	922

FACILITY NUMBER : (10)(03)(03)229-3554 DATE : 03/26/91

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM ELEM'T	TOTAL COST EST	ACCOMP DATE	FINAL COST	PRI
17	12/01/88 OZ	REPLACE CARPETS, 200 SQ. YARDS?, 7 YEAR CYCLE, CONTRACT $10,000 OH $7500	REC	A3	17500	/	0	922
18	12/01/88 OZ	REPLACE FLOORING SHEET GOODS ON STAIRS, 10 YEAR CYCLE, CONTRACT $1500 OH $1125	REC	A3	2625	/	0	922
20	12/01/88 OZ	GENERAL CLEANING, WALLS, CARPETS , FLOORS, ANNUALLY, CONTRACT $5000 OH $3750	REC	G3	8750	/	0	942
21	12/01/88 OZ	ITEM 20, 4TH YEAR OF CYCLE, CONTRACT $5000 OH $3750	REC	G3	8750	/	0	932
22	12/01/88 OZ	ITEM 20, 3RD YEAR OF CYCLE, CONTRACT $5000 OH $3750	REC	G3	8750	/	0	922
23	12/01/88 OZ	ITEM 20, 2ND YEAR OF CYCLE, CONTRACT $5000 OH $3750	REC	G3	8750	/	0	912
24	12/01/88 OZ	ITEM 20, 1ST YEAR OF CYCLE, CONTRACT $5000 OH $3750	REC	G3	8750	/	0	902
31	12/01/88 OZ	APPLIANCE REPAIR AND REPLACEMENT , RANGE AND REF., 10 YEAR CYCLE, 8 MH $1000 OH $750	REC	M2	1750	/	0	932
32	12/01/88 OZ	FIRE PLACE AND CHIMNEY CLEANING, ANNUALLY, 8 MH $400 OH $300	REC	M2	700	/	0	941
33	12/01/88 OZ	ITEM 32, 4TH YEAR OF CYCLE, 8 MH $400 OH $300	REC	M2	700	/	0	931
34	12/01/88 OZ	ITEM 32, 3RD YEAR OF CYCLE, 8 MH $400 OH $300	REC	M2	700	/	0	921
35	12/01/88 OZ	ITEM 32, 2ND YEAR OF CYCLE, 8 MH $400 OH $300	REC	M2	700	/	0	911
36	12/01/88 OZ	ITEM 32, 1ST YEAR OF CYCLE, 8 MH $400 OH $300	REC	M2	700	/	0	901
46	12/01/88 OZ	HEATING SYSTEM MAINTENANCE, OIL FIRED BOILER BURNER MAINTENANCE AND CHIMNEY CLEANING, SEMI-ANNUALLY, 8 MH $400 OH $300	REC	M2	700	/	0	931

FACILITY NUMBER : (10)(03)(03)229-3554 DATE : 03/26/91

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM ELEM'T	TOTAL COST EST	ACCOMP DATE	FINAL COST	PRI
47	12/01/88 OZ	ITEM 46, 4TH YEAR OF CYCLE, 8 MH $400 OH $300	REC	M2	700	/	0	931
48	12/01/88 OZ	ITEM 46, 3RD YEAR OF CYCLE, 8 MH $400 OH $300	REC	M2	700	/	0	921
49	12/01/88 OZ	ITEM 46, 2ND YEAR OF CYCLE, 8 MH $400 OH $300	REC	M2	700	/	0	911
50	12/01/88 OZ	ITEM 46, 1ST YEAR OF CYCLE, 8 MH $400 OH $300	REC	M2	700	/	0	901
51	12/01/88 OZ	BOILER REPLACEMENT, OIL FIRED, 1 5 YEAR CYCLE, CONTRACT $2500 OH $1875	REC	M2	4375		0	982
52	12/01/88 OZ	FUEL TANK REPLACEMENT, 15 YEAR CYCLE, CONTRACT $5000 OH $3750	REC	M2	8750		0	922
53	12/01/88 OZ	MECHANICAL VENTILATION REPLACEMENT, 10 YEAR CYCLE, 4 EXHAUST BLOWERS, 16 MH $1200 OH $900	REC	M2	2100		0	912
61	12/01/88 OZ	SAFETY AND CONDITION SURVEY, ANNUALLY, 8 MH $400 OH $300	REC	HS2	700		0	931
62	12/01/88 OZ	ITEM 61, 4TH YEAR OF CYCLE, 4 MH $200 OH $150	REC	HS2	350		0	921
63	12/01/88 OZ	ITEM 61, 3RD YEAR OF CYCLE, 4 MH $200 OH $150	REC	HS2	350		0	911
64	12/01/88 OZ	ITEM 61, 2ND YEAR OF CYCLE, 4 MH $200 OH $150	REC	HS2	350		0	901
65	12/01/88 OZ	ITEM 61, 1ST YEAR OF CYCLE, 4 MH $200 OH $150	REC	HS2	350		0	891
66	12/01/88 OZ	SAFETY EQUIPMENT, FIRE EXTINGUISHERS, ALARM SYSTEM, ANNUALLY, CONTRACT $200 OH $150	REC	HS2	350		0	931
67	12/01/88 OZ	ITEM 66, 4TH YEAR OF CYCLE, CONTRACT $200 OH $150	REC	HS2	350		0	921
68	12/01/88 OZ	ITEM 66, 3RD YEAR OF CYCLE, CONTRACT $200 OH $150	REC	HS2	350		0	911

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM
<<<<< SITE & FACILITY CONDITION ASSESSMENT >>>>>

FACILITY NUMBER : (10)(03)(03)229-3554 DATE : 03/26/91

WORK ITEM NO.	INSPECTION: DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM: ELEM'T	TOTAL COST EST	ACCOMP: DATE	FINAL COST	PRI
69	12/01/84 DZ	ITEM 66, 2ND YEAR OF CYCLE, CONT FACT $200 OH $150	REC	HS2	350		0	901
70	12/01/83 DZ	ITEM 66, 1ST YEAR OF CYCLE, CONT FACT $200 OH $150	REC	HS2	350		0	891
71	12/01/84 DZ	WATER HEATER REPLACEMENT, ELECTR IC, 40 GALLON, 10 YEAR CYCLE, 4 MH $40 OH $300	REC	M2	700		0	962
77	12/01/83 DZ	LIGHTING FIXTURE REPLACEMENT, 40 FIXTURES, 15 YEAR CYCLE, CONTRA CT $4000 OH $3000	REC	E2	7000		0	922
81	12/01/84 DZ	VANDALISM AND OTHER UNSCHEDULED MAINTENANCE, ANNUALLY, 80 MH $40 00 OH $3000	REC	G3	7000		0	932
82	12/01/83 DZ	ITEM 81, 4TH YEAR OF CYCLE, 80 M H $4000 OH $3000	REC	G3	7000		0	922
83	12/01/82 DZ	ITEM 81, 3RD YEAR OF CYCLE, 80 M H $4000 OH $3000	REC	G3	7000		0	912
84	12/01/81 DZ	ITEM 81, 2ND YEAR OF CYCLE, 80 M H $4000 OH $3000	REC	G3	7000		0	902
85	12/01/80 DZ	ITEM 81, 1ST YEAR OF CYCLE, 80 M H $4000 OH $3000	REC	G3	7000		0	891
86	12/01/82 DZ	SERVICE TREATMENT PLANT, DAILY M AINTENANCE, PERIODIC PUMPING, CO NTRACT PUMPING $1000, 50 MH $400 J OH $3750	REC	M2	8750		0	931
87	12/01/83 DZ	ITEM 86, 4TH YEAR OF CYCLE, CONT RACT $1000, 50 MH $400 OH $375 J	REC	M2	8750		0	921
88	12/01/84 DZ	ITEM 86, 3RD YEAR OF CYCLE, CONT RACT $1000, 50 MH $4000 OH $375 J	REC	M2	8750		0	911
89	12/01/85 DZ	ITEM 86, 2ND YEAR OF CYCLE, CONT RACT $1000, 50 MH $4000 OH $375 J	REC	M2	8750		0	901

FACILITY NUMBER : (10)(03)(03)229-3554 DATE : 03/26/91

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM ELEM'T	TOTAL COST EST	ACCOMP DATE	FINAL COST	PRI
98	10/ 1/87 DZ	ITEM 65, 1ST YEAR OF CYCLE, CONT ACT $1000, MD MH 24000 OH 1375	REC	M2	9750		0	891
91	10/01/87 DZ	POTABLE WATER SUPPLY SYSTEM, WEL L, PUMP, HEAT TRACE, ELECTRICAL C ONTROLS	REC	M2	0		0	0
101	11/25/85 DZ	ELECTRICAL PANEL ACCESS IN THE B OILER ROOM HAS BEEN BLOCKED BY S TORED MATERIALS IN THE BOILER RO OM	PROJ	HS2	100	07/88	100	861
102	11/25/85 DZ	OPEN CONTAINER OF FIRE STARTER S TORED NEAR THE BOILER	PROJ	HS2	75	05/87	75	861
104	11/25/85 DZ	THE MECHANICAL ROOM SHOULD NOT B E USED AS A GENERAL STORE ROOM	PROJ	HS2	0		0	861
105	11/25/85 DZ	CIRCULATING PUMP ON THE HEATING SYSTEM NEEDS REPAIR	PROJ	M2	100	05/87	250	861
107	11/25/85 DZ	ALL CU90 PLUGS THAT ARE NOT DEAD FRONT TYPE SHOULD BE REPLACED W ITH DEAD FRONT TYPE PLUGS TO PRE VENT ARCING OF LIVE PARTS WITH T HE METAL WALL PLATES	PROJ	E2	120	05/87	250	861
113	11/25/85 DZ	SHELVING ON THE EXTERIOR WALLS P REVENT WARM AIR FROM CIRCULATING IN THE ROOM CAUSING THE WATER S YSTEM TO FREEZE	PROJ	G3	150		0	963
119	11/25/85 DZ	FLAMMABLE STORAGE CABINET HAS BE EN INSTALLED NEXT TO THE BOILER IN THE BOILER ROOM	PROJ	HS2	50		0	861
120	01/27/87 DZ	REPLACE OUTSIDE STAIR LIGHTING, NEED VANDLE RESISTANT TYPE	PROJ	HS1	0		0	0
121	01/27/87 DZ	REPLACE TELEPHONE CONDUCTORS ON WALL IN FOYER			0		0	0

FACILITY NUMBER : (10)(03)(03)229-3554 DATE : 03/26/91

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM ELEM'T	TOTAL COST EST	ACCOMP DATE	FINAL COST	PRI
122	01/27/87 OZ	RELIGHT HALL IN RESTROOM AREA		HS1	0		0	0
123	01/27/87 OZ	INSTALL LIGHTED EXIT SIGNS WITH EMERGENCY BACKUP		HS1	0		0	0
124	01/27/87 OZ	INSTALL EMERGENCY LIGHTING		HS1	0		0	0
125	01/27/87 OZ	INSTALL GFI RECEPTICALS IN APART MENT BATH AND KITCHEN AREAS		HS1	0		0	0
126	01/27/87 OZ	REPLACE ELECTRICAL OUTLET NEAR B ACK DOOR OF AUDITORIUM, LOOSE IN BOX		HS1	0		0	0
127	01/27/87 OZ	REPLACE ELECTRICAL OUTLETS UNDER WINDOW SEATS, OUTLETS BROKEN FR OM MOUNTING YOKE		HS1	0		0	0
128	01/27/87 OZ	REPLACE BACK DIMMER SWITCH FOR L IGHTS ABOVE THE FIREPLACE		E1	0		0	0
129	01/27/87 OZ	PANEL BOARD IN AUDIO VISUAL ROOM HAS ACCESS BLOCKED		HS1	0		0	0
130	01/27/87 OZ	ELECTRICAL INSTALLATION IN AUDIO VISUAL ROOM DOES NOT MEET THE R EQUIREMENTS, NEED ARTICAL			0		0	0
131	01/27/87 OZ	12 X 12 GUTTER IN AUDIO VISUAL R OOM HAS A MIX OF LOW VOLTAGE CON DUCTORS AND LINE VOLTAGE CONDUCT ORS. CODE REQUIRES BOTH CONDUCTO RS TO BE RATED FOR THE HIGHER VO LTAGE			0		0	0
132	01/27/87 OZ	RELAMP OUTSIDE LIGHTING AT POINT S OF EGRESS			0		0	0
133	12/15/?? OZ	CHECK GLYCOL IN SNOW MELTING SYS TEM FOR OUTSIDE STAIRS, 4 MH 320 0 OH 8150	REC	M2	350		0	902

FACILITY NUMBER : (10)(03)(03)229-3554 DATE : 03/26/91

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CODE REFER	SYSTEM ELEM'T	TOTAL COST EST	ACCOMP DATE	FINAL COST	PRI
134	12/15/88 OZ	MOUNT FIRE EXTINGUISHER NEAR DOO R IN BOILER ROOM, 1 MH $50 OH $ 35	REC	HS2	85		0	891
135	12/15/88 OZ	REPLACE TRIM RINGS FOR FOYER AND HALL LIGHTING, RELAMP RECESSES FIXTURE, R-40, 2 MH $150 OH $12 5	REC	E2	375		0	882
136	12/15/88 OZ	INSTALL GFI IN APARTMENT BATH, 2 MH $150 OH $125	REC	HS1	375		0	891
137	12/15/88 OZ	REPLACE STAIRWELL CHANDELIER, 3 MH $250 OH $185	REC	E2	435		0	891
138	12/15/88 OZ	MAKE LIGHT SWITCH BEHIND SIGN AT TOP OF STAIRWELL ACCESSABLE, MO VE SIGN?	REC	HS1	300		0	891
139	12/15/88 OZ	REPLACE THE BROKEN TOGGLE SWITCH IN THE AUDIO VISUAL ROOM, 1 MH $100 OH $75	REC	HS2	175		0	891
140	12/15/88 OZ	RELAMP OUTSIDE EGRESS FIXTURES, 2 MH $100 OH $75	REC	HS2	175		0	891
141	12/15/88 OZ	INSTALL NEW ALARM SYSTEM FOR INT RUSION AND FIRE, CONTRACT $10,00 0 OH $7500	REC	G3	17500		0	902

CHUGACH NATIONAL FOREST
FACILITIES MASTER PLAN
LIST OF EXISTING FACILITIES 09/10/90

Facility Number	Facility Name	Facility Type	Maint Level	Total SF	Year Constr	Historic	Current Value $	Annual Maint Cost $ (inc backlog)	Ann Maint Cost to Current Value %	Condition and Comment
01030000	PORTAGE GLACIER SITE		4		19	N		1555.		Site Plan app. 4/2/84 RO
01031405	BBVC LAGOON LIFT STA	UTILITY	4	120	1973	N	35000	3364.	9.61	
01033321	PORTAGE 8-MAN TOILET	SERVICE	4	1254	1984	N	150000	46980.	31.3	
01033327	BEGICH BOGGS VISITOR	SERVICE	5	17020	1986	N	7770000	5497.	0.07	

MODIFIED 120 REPORT — DISTRICT: GLACIER

FACILITY NUMBER : (10)(04)(01)(103)(3327) — FACILITY NAME : BEGICH BOGGS VISITOR — REPORT DATE : 12/17/90

WORK ITEM NO.	WORK ITEM DESCRIPTION	CLASS : PERIOD	TOTAL COST EST	F* N* D*	TOTAL ESTIMATED COST IN $ (%) BY FUND CODE: CNFA	NFFA	QMQM	NFRN	NFWS	WCWC	OTHR	PRI
2	COVER SHARP EDGES ON EXHIBITS		300	M				300. (100)				89 1
17	Repair roofing membrane and recoat along the parapet wall. [continued]	PREVE:	2500	M				2500. (100)				90 1
19	FURNACE AND HOT WATER HEATER INSPECTION	RECUR: 1	400	M				400. (100)				91 0
21	SERVICE POWER GENERATION AND DIST. SYSTEM	RECUR: 1	400	M				400. (100)				89 4
22	SAFETY AND CONDITION SURVEY	RECUR: 1	100	M				100. (100)				91 0
23	SERVICE SAFETY EQUIPMENT (FIRE EXT, SMOKE DET, ETC:)	RECUR: 1	100	M				100. (100)				91 0
24	PLACE EXPLANATION TAGS ON FURNACE VALVES AND SWITCHES		200	M				200. (100)				89 1
28	Unscheduled maintenance for unforeseen needs/emergencies.	RECUR: 1	90	M				90. (100)				90 6
32	Modify grating on iceburg system.		500	M				500. (100)				91 4
33	Recaulk concrete, north side theater.	PREVE:	2000	M				2000. (100)				91 3
34	Water seal exterior of building.	PREVE:	8000	M				8000. (100)				91 3
36	Repair observation room door threshold and door openers.		2500	M				2500. (100)				91 4

MODIFIED 120 REPORT — DISTRICT: GLACIER

FACILITY NUMBER : (10)(04)(01)(103)(3327) — FACILITY NAME : BEGICH BOGGS VISITOR — REPORT DATE : 12/17/90

WORK ITEM NO.	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST *F* *N* *D*	TOTAL ESTIMATED COST IN $ (%) BY FUND CODE CNFA	NFFA	QMQM	NFRN	NFWS	WCWC	OTHR	PRI
37	Replace carpet in building.	RECUR 8	40000 M				40000. (100)				91 5
38	Improve bathroom air exhaust.	SANIT	1000 M				1000. (100)				91 1
42	Replace zone control valves.	RETRO	4000 M				4000. (100)				91 3
43	Systems control computer, repair and upgrade.	RETRO	2000 M				2000. (100)				91 3
44	Systems control computer maintenance and training.	RECUR 1	2000 M				2000. (100)				91 3
45	Alarm system service and training.	RECUR 1	2500 M				2500. (100)				91 1
46	Install generator override system (emergency shut-off for Fire Dept)	SAFET	3000 C	3000. (100)							91 1
47	Install iceberg spot light.		1000 C	1000. (100)							91 5
48	Install shelving in a/v equipment room.		1000 C	1000. (100)							91 5
49	Remove refrigeration system.		2000 M				2000. (100)				91 5
	FACILITY SUBTOTALS		75590	5000.	0.	0.	70590.	0.	0.	0.	

MODIFIED 120 REPORT — DISTRICT: GLACIER

FACILITY NUMBER : (10)(04)(01)(103)(3321) — FACILITY NAME : PORTAGE 8-MAN TOILET — REPORT DATE : 12/17/90

WORK ITEM NO.	WORK ITEM DESCRIPTION	CLASS : PERIOD:	TOTAL COST EST	*F* *N* *D*	TOTAL ESTIMATED COST IN $ (%) BY FUND CODE CNFA	NFFA	QMQM	NFRN	NFWS	WCWC	OTHR	PRI
9	REPLACE SIDEWALK, WINDWALL FOUNDATION AND INSTALL NFS BACKFILL UNDERNEATH BOTH. FROST HEAVE PROBLEM. TRIP HAZARD ($30,000)		40000	M				40000. (100)				89 1
12	SAFETY AND CONDITION SURVEY	RECUR: 1	100	M				100. (100)				91 0
13	INTERIOR PAINTING	RECUR: 5	2000	M				2000. (100)				90 4
14	GENERAL CLEANING, FLOORS, WALLS, FANS, VENTS, ETC.	RECUR: 1	10000	M				10000. (100)				91 4
15	GROUNDS MAINT.	RECUR: 1	1000	M				1000. (100)				91 4
17	SERVICE SAFETY EQUIPMENT	RECUR: 1	75	M				75. (100)				91 0
18	Unscheduled maintenance for unforeseen needs/emergencies.	RECUR: 1	90	M				90. (100)				90 6
20	Repair door locks.	PREVE:	1000	M				1000. (100)				91 4
21	Purchase new door closures and three door frame strengtheners.	PREVE:	500	M				500. (100)				91 4
22	New plumbing parts and electrical parts, toilet paper holders, signing for doors.		500	M				500. (100)				91 4
	FACILITY SUBTOTALS		55265		0.	0.	0.	55265.	0.	0.	0.	

MODIFIED 120 REPORT — DISTRICT: GLACIER

FACILITY NUMBER : (10)(04)(01)(103)(1405) — FACILITY NAME : BBVC LAGOON LIFT STA — REPORT DATE : 12/17/90

WORK ITEM NO.	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST EST	*F* *N* *D*	TOTAL ESTIMATED COST IN $ (%) BY FUND CODE CNFA	NFFA	QMQM	NFRN	NFWS	WCWC	OTHR	PRI
2	INSTALL HOUR METER (MUNCIPALITY)		1000	C	1000. (100)	( )	( )	( )	( )	( )	( )	89 1
3	REANCHOR DOOR THRESHOLD. INSTALL NEW HASP AND LOCK: ON DOOR. (REPEAT OF PREVIOUS ITEM NO.4)		100	M	( )	( )	( )	100. (100)	( )	( )	( )	90 4
4	REPAIR ROOF (AGAIN)		750	M	( )	( )	( )	750. (100)	( )	( )	( )	89 1
5	REPAIR DOORS (AGAIN)		500	M	( )	( )	( )	500. (100)	( )	( )	( )	90 4
6	SAFETY AND CONDITION SURVEY	RECUR 1	100	M	( )	( )	( )	100. (100)	( )	( )	( )	91 0
7	SERVICE SAFETY EQUIPMENT	RECUR 1	75	M	( )	( )	( )	75. (100)	( )	( )	( )	91 0
8	INSTALL BEACON ON BLDG TO WARN OF PUMP FAILURE. LIGHT SHOULD BE HIGH ENOUGH TO B E SEEN FROM ROADWAY:		500	C	500. (100)	( )	( )	( )	( )	( )	( )	89 1
9	Unscheduled maintenance for unforeseen needs/emergencies.	RECUR 1	90	M	( )	( )	( )	90. (100)	( )	( )	( )	90 6
	FACILITY SUBTOTALS		3115	* *	1500.	0.	0.	1615.	0.	0.	0.	

MODIFIED 120 REPORT — DISTRICT: GLACIER

FACILITY NUMBER : (10)(04)(01)(103)(0000) — FACILITY NAME : PORTAGE GLACIER SITE — REPORT DATE : 12/17/90

WORK ITEM NO.	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST EST	F* N* D*	TOTAL ESTIMATED COST IN $ (%) BY FUND CODE CNFA	NFFA	QMQM	NFRN	NFWS	WCWC	OTHR	PRI
4	GROUNDS MAINT.	RECUR: 1	100	M *	( )	( )	( )	100. (100)	( )	( )	( )	91 4
5	SAFETY AND CONDITION SURVEY	RECUR: 1	50	M *	( )	( )	( )	50. (100)	( )	( )	( )	91 0
6	Unscheduled maintenance for unforeseen needs/emergencies.	RECUR: 1	90	M *	( )	( )	( )	90. (100)	( )	( )	( )	90 6
9	Replace four light and remount sign.		3000	M *	( )	( )	( )	3000. (100)	( )	( )	( )	91 4
10	Reline ditch on paved path of Moraine Trail.	PREVE:	1000	M *	( )	( )	( )	1000. (100)	( )	( )	( )	91 4
11	Replace parking lot light lamps.	SAFET:	1000	M *	( )	( )	( )	1000. (100)	( )	( )	( )	91 1
12	Repair broken curbing.	PREVE:	1000	M *	( )	( )	( )	1000. (100)	( )	( )	( )	91 4
14	Build new path between BBVC and Portage Glacier Lodge.		15000	C *	15000. (100)	( )	( )	( )	( )	( )	( )	91 5
16	Construction debris clean-up.	SAFET:	300	M *	( )	( )	( )	300. (100)	( )	( )	( )	91 4
	FACILITY SUBTOTALS		21540	* *	15000.	0.	0.	6540.	0.	0.	0.	

United States Department of Agriculture | Forest Service | Chugach NF Glacier RD

‹‹‹‹‹ SITE & FACILITY CONDITION ASSESSMENT - REPORT 120 ›››››

REPORT DATE: 12/17/90

EXPLANATION OF REPORT TERMS (see FMS System Documentation for full description):

FACILITY NAME: Name of facility. Note: Sites names are included under "FACILITY NAME" when maintenance items pertain to the site itself. i.e. brushing, water system repair, etc.

FACILITY TYPE: Primary Use: HOUSing, OFFIce, STORage, SERVice, UTILity, RESEarch, INDUstrial, OTHEr. Subuse: See System Documentation.

BENEFITING FUNCTIONS: Functions that use or benefit from the facility in the percentage of use. Determined by District Ranger, Station Director, or Facilities Engineer as appropriate.

MAINTENANCE LEVEL: Reference: Table 1, EM 7310-3.
- Level 1: All types, no longer needed, no human occupancy.
- Level 2: All types, those no longer used as designed, infrequent human use.
- Level 3: Minor offices (non-public), shops, warehouses, seasonal quarters.
- Level 4: Major offices and high employee-use area with less than 50 visitors/day.
- Level 5: Major urban and suburban offices, visitor centers, major labs, >50 visitors/day.

WORK ITEM NO.: An identification number for a maintenance activity.

INSPECTION DATE & INITIALS: Date task identified and initials of person identifying need.

CLASS: Either SAFET, SANIT, RECUR, CODE, PREVE, RETRO, or blank. It is important to identify RECURring items as the program needs this code to automatically reenter recurring tasks.

PERIOD: The period in years (use 1 for < 1 year) for recurring maintenance items. Needed for incrementation.

TOTAL ESTIMATED COST: Total estimated cost to complete the item including all labor, equipment, material, and contract prep/admin (if req'd), but not including general administrative costs.

MAINT/CONST/OPERS: Identified either as MAINT, CONSTR, or OPERS. Maintenance is defined to cover all types of of maintenance to the structure or building including any government owned property and appliances integral to the facility. It does not cover betterments, additions, or replacement construction and new construction. Maintenance also includes inspection, management, and direct maintenance of utility systems, vehicular and pedestrian circulation and access ways and/or other government furnished site improvements. Construction (new, betterments, additions) can not be funded through Facilities Maintenance monies (NFFA). Construction funding must come from CNFA monies, or project monies (<$100,000).

ACCOMPLISHMENT: MM/YY: month/year task completed. COST: actual cost to complete task.

REMARKS: Work area for District/Institute notes.

PRIORITY: First two digits are the fiscal year the work was initially planned for. The last digit is the priotity based on Table A-4, EM 7310-3 (mod). Priority 0: Starting Point, safety and condition surveys, service safety equipment, safety items that pose an immediate hazard. Priority 2: General safety items. Priority 3: structural repair. Priority 3: Energy conservation. Priority 4: Routine. Priority 5: Nice to haves. Priority 6: Emergency repair, required for unforeseen needs.

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM
<<<<< SITE & FACILITY CONDITION ASSESSMENT - 120 REPORT >>>>>
REPORT DATE: 12/17/90

FOREST : 04 CHUGACH
DISTRICT : GLACIER
SITE NAME: PORTAGE GLACIER SITE

FACILITY NAME: BEGICH BOGGS VISITOR
FACILITY TYPE: SERVICE
BENEFITING FUNCTIONS NFFA: %, QMQM: %, NFRN: 100%, OTHR: %. WCWC: %, NFWS: %,

YEAR CONSTRUCTED: 1986
GROSS SQUARE FEET: 17020
MAINTENANCE LEVEL: 5

FACILITY NUMBER : (10)(04)(01)(103)(3327)

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST EST	MAINT CONST OPERS	ACCOMPLISHMENT MM/YY	ACCOMPLISHMENT COST	FOREST WORKSHEET COLUMNS REMARKS	FOREST WORKSHEET COLUMNS PRI
2:	/ /87	COVER SHARP EDGES ON EXHIBITS		300	MAINT	/			89 1
17:	12/29/88 JWS	Repair roofing membrane and recoat along the parapet wall. [continued]	PREVE:	2500	MAINT	/			90 1
19:	12/29/88 JWS	FURNACE AND HOT WATER HEATER INSPECTION	RECUR: 1	400	MAINT	0/ 0	0		91 0
21:	12/29/88 JWS	SERVICE POWER GENERATION AND DIST. SYSTEM	RECUR: 1	400	MAINT	/			89 4
22:	12/29/88 JWS	SAFETY AND CONDITION SURVEY	RECUR: 1	100	MAINT	0/ 0	0		91 0
23:	1 /10/89 JWS	SERVICE SAFETY EQUIPMENT (FIRE EXT, SMOKE DET, ETC.)	RECUR: 1	100	MAINT	0/ 0	0		91 0
24:	/ /89 JWS	PLACE EXPLANATION TAGS ON FURNACE VALVES AND SWITCHES		200	MAINT	/			89 1
28:	02/27/90 RAH	Unscheduled maintenance for unforeseen needs/emergencies.	RECUR: 1	90	MAINT	/			90 6
32:	/ /90	Modify grating on iceburg system.		500	MAINT	/			91 4
33:	/ /90	Recaulk concrete, north side theater.	PREVE:	2000	MAINT	/			91 3

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM
<<<<< SITE & FACILITY CONDITION ASSESSMENT - 120 REPORT >>>>>
REPORT DATE: 12/17/90

FOREST : 04 CHUGACH
DISTRICT : GLACIER
SITE NAME: PORTAGE GLACIER SITE
FACILITY NAME: BEGICH BOGGS VISITOR
FACILITY TYPE: SERVICE
BENEFITING FUNCTIONS NFFA: %, QMQM: %, NFRN: 100%,
WCWC: %, NFWS: %, OTHR: %.
YEAR CONSTRUCTED: 1986
GROSS SQUARE FEET: 17020
MAINTENANCE LEVEL: 5
FACILITY NUMBER : (10)(04)(01)(103)(3327)

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST EST	MAINT CONST OPERS	ACCOMPLISHMENT MM/YY	ACCOMPLISHMENT COST	FOREST WORKSHEET COLUMNS REMARKS	FOREST WORKSHEET COLUMNS PRI
34:	/ /90	Water seal exterior of building.	PREVE:	8000:	MAINT*	/			91 3
35:	/ /90	Replace pod window wall.	RETRO:	100000:	MAINT*	/			92 5
36:	/ /90	Repair observation room door threshold and door openers.		2500:	MAINT*	/			91 4
37:	/ /90	Replace carpet in building.	RECUR: 8	40000:	MAINT*	/			91 5
38:	/ /90	Improve bathroom air exhaust.	SANIT:	1000:	MAINT*	/			91 1
42:	/ /90	Replace zone control valves.	RETRO:	4000:	MAINT*	/			91 3
43:	/ /90	Systems control computer, repair and upgrade.	RETRO:	2000:	MAINT*	/			91 3
44:	/ /90	Systems control computer maintenance and training.	RECUR: 1	2000:	MAINT*	/			91 3
45:	/ /90	Alarm system service and training.	RECUR: 1	2500:	MAINT*	/			91 1
46:	/ /90	Install generator override system (emergency shut-off for Fire Dept)	SAFET:	3000:	CONST*	/			91 1

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM
<<<<< SITE & FACILITY CONDITION ASSESSMENT - 120 REPORT >>>>>
REPORT DATE: 12/17/90

FOREST : 04 CHUGACH
DISTRICT : GLACIER
SITE NAME: PORTAGE GLACIER SITE

FACILITY NAME: BEGICH BOGGS VISITOR
FACILITY TYPE: SERVICE
BENEFITING FUNCTIONS NFFA: %, QMQM: %, NFRN: 100%, WCWC: %, NFWS: %, OTHR: %.

YEAR CONSTRUCTED: 1986
GROSS SQUARE FEET: 17020
MAINTENANCE LEVEL: 5

FACILITY NUMBER : (10)(04)(01)(103)(3327)

WORK ITEM NO.	INSPECTION: DATE & INITIALS	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST EST	MAINT CONST OPERS	ACCOMPLISHMENT MM/YY	ACCOMPLISHMENT COST	FOREST WORKSHEET COLUMNS REMARKS	FOREST WORKSHEET COLUMNS PRI
47:	/ /90	Install iceberg spot light.		1000	CONST	/			91 5
48:	/ /90	Install shelving in a/v equipment room.		1000	CONST	/			91 5
49:	/ /90	Remove refrigeration system.		2000	MAINT	/			91 5

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM
<<<<< SITE & FACILITY CONDITION ASSESSMENT - 120 REPORT >>>>>
REPORT DATE: 12/17/90

FOREST : 04 CHUGACH
DISTRICT : GLACIER
SITE NAME: PORTAGE GLACIER SITE
FACILITY NAME: PORTAGE 8-MAN TOILET
FACILITY TYPE: SERVICE
BENEFITING FUNCTIONS NFFA: %, QMQM: %, NFRN: 100%, WCWC: %, NFWS: %, OTHR: %.
YEAR CONSTRUCTED: 1984
GROSS SQUARE FEET: 1254
MAINTENANCE LEVEL: 4

FACILITY NUMBER : (10)(04)(01)(103)(3321)

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST EST	MAINT CONST OPERS	ACCOMPLISHMENT MM/YY	ACCOMPLISHMENT COST	REMARKS	FOREST WORKSHEET COLUMNS PRI
2:	/ /87	PAINT AND STAIN EXTERIOR	RECUR: 5	3800:	MAINT*	/	*		93 4*
4:	/ /87	REPAIR ROOF	RECUR: 7	900:	MAINT*	0/ 0	0*		94 4*
5:	/ /87	REPAIR DOORS AND WINDOWS	RECUR: 5	900:	MAINT*	0/ 0	0*		92 4*
9:	/ /88 JWS	REPLACE SIDEWALK, WINDWALL FOUNDATION AND INSTALL NFS BACKFILL UNDERNEATH BOTH. FROST HEAVE PROBLEM. TRIP HAZARD ($30,000)		40000:	MAINT*	/	*		89 1*
12:	12/29/88 JWS	SAFETY AND CONDITION SURVEY	RECUR: 1	100:	MAINT*	0/ 0	0*		91 0*
13:	12/29/88 JWS	INTERIOR PAINTING	RECUR: 5	2000:	MAINT*	/	*		90 4*
14:	12/29/88 JWS	GENERAL CLEANING, FLOORS, WALLS, FANS, VENTS, ETC.	RECUR: 1	10000:	MAINT*	0/ 0	0*		91 4*
15:	12/29/88 JWS	GROUNDS MAINT.	RECUR: 1	1000:	MAINT*	0/ 0	0*		91 4*
16:	/ /89 JWS	REPLACE LIGHT BULBS IN STALLS	RECUR: 2	100:	MAINT*	0/ 0	0*		92 4*
17:	1 /10/89 JWS	SERVICE SAFETY EQUIPMENT	RECUR: 1	75:	MAINT*	0/ 0	0*		91 0*

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM
<<<<< SITE & FACILITY CONDITION ASSESSMENT - 120 REPORT >>>>>
REPORT DATE: 12/17/90

FOREST : 04 CHUGACH
DISTRICT : GLACIER
SITE NAME: PORTAGE GLACIER SITE

FACILITY NAME: PORTAGE 8-MAN TOILET
FACILITY TYPE: SERVICE
BENEFITING FUNCTIONS NFFA: %, QMQM: %, NFRN: 100%,
WCWC: %, NFWS: %, OTHR: %.

YEAR CONSTRUCTED: 1984
GROSS SQUARE FEET: 1254
MAINTENANCE LEVEL: 4

FACILITY NUMBER : (10)(04)(01)(103)(3321)

WORK ITEM NO.	INSPECTION DATE & INITIALS	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST EST	MAINT CONST OPERS	ACCOMPLISHMENT MM/YY	ACCOMPLISHMENT COST	FOREST WORKSHEET COLUMNS REMARKS	FOREST WORKSHEET COLUMNS PRI
18:	02/27/90 RAH	Unscheduled maintenance for unforeseen needs/emergencies.	RECUR: 1	90:	MAINT*	/	*		90 6
20:	/ /90	Repair door locks.	PREVE:	1000:	MAINT*	/	*		91 4
21:	/ /90	Purchase new door closures and three door frame strengtheners.	PREVE:	500:	MAINT*	/	*		91 4
22:	/ /90	New plumbing parts and electrical parts, toilet paper holders, signing for doors.		500:	MAINT*	/	*		91 4

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM
<<<<< SITE & FACILITY CONDITION ASSESSMENT - 120 REPORT >>>>>
REPORT DATE: 12/17/90

FOREST : 04 CHUGACH
DISTRICT : GLACIER
SITE NAME: PORTAGE GLACIER SITE
FACILITY NAME: BBVC LAGOON LIFT STA
FACILITY TYPE: UTILITY
BENEFITING FUNCTIONS NFFA: %, QMQM: %, NFRN: 100%, WCWC: %, NFWS: %, OTHR: %.
YEAR CONSTRUCTED: 1973
GROSS SQUARE FEET: 120
MAINTENANCE LEVEL: 4
FACILITY NUMBER : (10)(04)(01)(103)(1405)

WORK ITEM NO.	INSPECTION: DATE & INITIALS	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST EST	MAINT/CONST OPERS	ACCOMPLISHMENT MM/YY	ACCOMPLISHMENT COST	FOREST WORKSHEET COLUMNS REMARKS	FOREST WORKSHEET COLUMNS PRI
2:	/ /85 JWS	INSTALL HOUR METER (MUNCIPALITY)		1000	CONST	/			89 1
3:	/ /88 JWS	REANCHOR DOOR THRESHOLD. INSTALL NEW HASP AND LOCK: ON DOOR. (REPEAT OF PREVIOUS ITEM NO.4)		100	MAINT	/			90 4
4:	/ /88 JWS	REPAIR ROOF (AGAIN)		750	MAINT	/			89 1
5:	/ /88 JWS	REPAIR DOORS (AGAIN)		500	MAINT	/			90 4
6:	1 /10/89 JWS	SAFETY AND CONDITION SURVEY	RECUR 1	100	MAINT	0/ 0	0		91 0
7:	1 /10/89 JWS	SERVICE SAFETY EQUIPMENT	RECUR 1	75	MAINT	0/ 0	0		91 0
8:	/ /89 JWS	INSTALL BEACON ON BLDG TO WARN OF PUMP FAILURE. LIGHT SHOULD BE HIGH ENOUGH TO B E SEEN FROM ROADWAY:		500	CONST	/			89 1
9:	02/27/90 RAH	Unscheduled maintenance for unforeseen needs/emergencies.	RECUR 1	90	MAINT	/			90 6

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM
<<<<< SITE & FACILITY CONDITION ASSESSMENT - 120 REPORT >>>>>
REPORT DATE: 12/17/90

FOREST : 04 CHUGACH
DISTRICT : GLACIER
SITE NAME: PORTAGE GLACIER SITE
FACILITY NAME: PORTAGE GLACIER SITE
FACILITY TYPE:
BENEFITING FUNCTIONS NFFA: %, QMQM: %, NFRN: 100%, WCWC: %, NFWS: %, OTHR: %.
YEAR CONSTRUCTED: 19
GROSS SQUARE FEET:
MAINTENANCE LEVEL: 4

FACILITY NUMBER : (10)(04)(01)(103)(0000)

WORK ITEM NO.	INSPECTION: DATE & INITIALS	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST EST	MAINT CONST OPERS	ACCOMPLISHMENT MM/YY	ACCOMPLISHMENT COST	FOREST WORKSHEET COLUMNS REMARKS	FOREST WORKSHEET COLUMNS PRI
2:	10/17/88 JWS	Rebrush complete interior of fenced lagoon enclosure, especially on membrane.	RECUR: 2	400:	MAINT*	0/ 0	0*		92 4*
4:	12/29/88 JWS	GROUNDS MAINT.	RECUR: 1	100:	MAINT*	0/ 0	0*		91 4*
5:	12/29/88 JWS	SAFETY AND CONDITION SURVEY	RECUR: 1	50:	MAINT*	0/ 0	0*		91 0*
6:	02/27/90 RAH	Unscheduled maintenance for unforeseen needs/emergencies.	RECUR: 1	90:	MAINT*	/	*		90 6*
7:	/ /87	Repair barbed wire on lagoon fence.	SAFET:	250:	MAINT*	/	*		92 4*
9:	/ /90	Replace four light and remount sign.	:	3000:	MAINT*	/	*		91 4*
10:	/ /90	Reline ditch on paved path of Moraine Trail.	PREVE:	1000:	MAINT*	/	*		91 4*
11:	/ /90	Replace parking lot light lamps.	SAFET:	1000:	MAINT*	/	*		91 1*
12:	/ /90	Repair broken curbing.	PREVE:	1000:	MAINT*	/	*		91 4*
14:	/ /90	Build new path between BBVC and Portage Glacier Lodge.	:	15000:	CONST*	/	*		91 5*

USDA FOREST SERVICE - ALASKA (10) REGION
FACILITY MAINTENANCE MANAGEMENT SYSTEM
<<<<< SITE & FACILITY CONDITION ASSESSMENT - 120 REPORT >>>>>
REPORT DATE: 12/17/90

FOREST : 04 CHUGACH
DISTRICT : GLACIER
SITE NAME: PORTAGE GLACIER SITE
FACILITY NAME: PORTAGE GLACIER SITE
FACILITY TYPE:
BENEFITING FUNCTIONS NFFA: %, QMQM: %, NFRN: 100%, WCWC: %, NFWS: %, OTHR: %.
YEAR CONSTRUCTED: 19
GROSS SQUARE FEET:
MAINTENANCE LEVEL: 4
FACILITY NUMBER : (10)(04)(01)(103)(0000)

WORK ITEM NO.	INSPECTION: DATE & INITIALS	WORK ITEM DESCRIPTION	CLASS PERIOD	TOTAL COST EST	MAINT CONST OPERS	ACCOMPLISHMENT MM/YY	ACCOMPLISHMENT COST	FOREST WORKSHEET COLUMNS REMARKS	FOREST WORKSHEET COLUMNS PRI
16:	/ /90	Construction debris clean-up.	SAFET:	300	MAINT	/			91 4

APPENDIX B - References for Prospective Funding Sources

DIRECTORIES

Annual Register of Grant Support. Chicago. Marquis.

Grant programs of public and private agencies, in support of individuals. Entries are arranged by broad subject category. Over 2000 entries, subject, organization, and geographic indexes.

Catalog of Federal Domestic Assistance. Washington: Office of Management and the Budget.

The basic resource on Federal funding. Issued annually in loose-leaf form; updated six months after publication. Full information on Federal programs, including addresses and telephone numbers.

Coleman, William Emmet. Grants in the Humanities: a Scholar's Guide to Funding Sources. New York Neal-Schuman, 1984.

Includes a sample proposal and sample budget along with information on granting agencies.

Feingold, S. Norman and Feingold, Marie. Scholarships, Fellowships and Loans Arlington, Ma Bellman Pub.

Foundation, government, and private sources of scholarhip aid Published irregularly.

Foundation Center. Comsearch Printouts New York, Foundation Center.

Computer-produced printouts listing foundation grants awarded in a selection of 99 subject areas. Each Comsearch record includes, in addition to foundation names and locations, the amount of the award a description of the activity funded, and date of the award. A list of available topics, and order form, is available from the Center

The Foundation Directory. New York: Foundation Center.

The major directory of non-profit, non-governmental funding sources, both to individuals and institutions. Limited to foundations with assets of $1,000,000 or more, or those which made grants of $100,000 or more a year. Information includes purpose, financial data, contact person, number or awards given and average amount of grant Published every other year with supplements in alternating years

The Foundation Grants Index. New York: Foundation Center.

Describes grants awarded by more than 400 foundations Updated every 1-2 years.

Fund Sources in Health and Allied Fields. Phoenix: Oryx Press

Awards and grants from Federal and private sources Expensive publication.

Funding Guide for Native Americans: the First Comprehensive Guide to Private Sector Funds for Native People. Broken Arrow, OK: Dean Chavers and Associates, 1983.

Private sector sources of funds for native Americans. Includes grant-writing advice.

The Grants Register. London: Macmillan.

An international directory or fellowships grants and similar financial aids available to graduate students and advanced scholars throughout the English-speaking world. Brief information. Subject index. Updated every two years.

Guide to California Foundations. San Francisco: Northern California Grantmakers.

Basic data - assets, recent grant awards, contact persons - on California private foundations. Published irregularly.

Guide to Research Support. Washington: American Psychological Association.

A very thorough handbook identifying Federal sources of funding for behavioral research. Arranged by government departments and agencies, with program descriptions, addresses, contact persons, and telephone numbers. Subject index.

Leider, Robert. Robert Leider's Your Own Financial Aid Factory: the Guide to Locating College Money. Alexandria, VA: Octameron Press, 1982.

National Directory of Corporate Charity. California edition. San Francisco: Regional Young Adult Project, 1981.

The first directory describing corporate giving programs. Lists 620 corporations in California, and describes their giving patterns. Geographic index.

Schlachter, G. Directory of Financial Aids for Women. 2d ed. Los Angeles: Reference Service Press, 1982.

Over 1,100 references to scholarships, fellowships, loans, grants, and internships available to women. In addition to the usual donor profiles, the volume provides a list of women's financial institutions and an annotated bibliography of financial aids directories.

Scholarships, Fellowships and Loans News Service and Counselors Information Services. Arlington, MA: Bellman Pub.

Quarterly pamphlets of recent scholarship offerings. Emphasis is on undergraduate study.

Shellow, J.R. The Grantseekers Guide: a Directory for Social and Economic Justice Projects. Chicago: National Network of Grantmakers, 1982.

A directory of change-oriented foundations interested in supporting community-based programs and social and economic justice projects.

Source Book Profiles. New York. Foundation Center
In-depth, comprehensive descriptions (4-6 pages each) of the 1000 largest foundations. 500 profiles are issued each year, and updates to those 500 on alternate years.

Taft Corporate Giving Directory. Washington, D.C. Taft Corporation.
Annual directory of philanthropic programs of over 500 for-profit corporations. Arranged alphabetically by name of corporation. Includes contact persons and addresses lists types of grant, typical and past recipients, priorities, amounts of grant. Gives short profiles of "who runs the company" and "who runs the Foundation". Tells where Company gives and where it operates. Delineates application procedure. Eight indexes including geographical and subject indexes, indexes to individuals. Far more information than "Foundation Index" but more limited as to scope.

DATABASES

Using computer databanks to obtain information about funding sources has certain advantages. The databanks are often more up-to-date than their printed equivalents; saving in time can be significant; and the power of the computer to compare and combine can turn up sources that might have been missed in a manual search and can provide a result specifically tailored to your needs. For example, a search can seek out funding sources for "a treatment program for women alcoholics in rural areas."

In most cases looking in the right directories and other refer- ence sources is preferable, at least as a first step. It's important to get a general sense of what is being funded, that is, to use browsing as a brainstorming technique. Browsing on the computer at $100 an hour can get expensive!

Most public and academic libraries have information about the local availability of online searches. In addition, Online Database Search Services Directory (Gale Research Co.) and Marquis National Directory of Online Professionals are referral guides to computerized retrieval and associated services throughout the U.S.

The major funding information databases:

FEDERAL ASSISTANCE PROGRAMS RETRIEVAL SYSTEM (FAPRS).
The online equivalent of the Catalog of Federal Domestic Assistance (see above under Directories), FAPRS can provide a list of Federal programs according to specific applicant criteria - geographic, type of applicant, type of assistance, topical category, etc. Further information is available from Federal Program Information Branch, Room 6001, Budget Review Division, Office of Management and Budget, 726 Jackson Place, NW, Washington, D.C. 20503. (202)395-3112. In California, the FAPRS access point is at the University of California, Davis (APC Extension, U. Davis, Davis, CA 95616, (916)752-3000).

FEDERAL RESEARCH IN PROGRESS (National Technical Information Service)

Reports ongoing federally funded research projects. Valuable for locating sources of support, avoiding research duplication, identifying resource persons. Among the agencies which contribute to the database are the Department of Agriculture, the National Institute for Occupational Safety and Health, the National Institutes of Health, and the Veterans Adminstration. Updated semiannually.

FOUNDATION DIRECTORY (Foundation Center)

Over 3,500 foundations which have assets of $1 million or more, or make grants of $100,000 or more annually. Searchable by subject or keyword. Updated semiannually. The print equivalent is described in section I, above.

FOUNDATION GRANTS INDEX (Foundation Center)

Grants awarded by more than 400 foundations. Searchable by subject or keyword. The printed equivalent is described in Section I, above. Updated bi-monthly.

NATIONAL FOUNDATIONS (Foundation Center)

Brief information on a large number of foundations (more than 21,000), and useful for identifying local, smaller foundations. Searchable by city, county, zip code, area code, but not by subject. Updated annually.

GRANTS (Oryx Press)

Information on over 2,200 available grants offered by federal, state, and local governments, commercial organizations, and foundations. Searchable by subject and keywords. Updated monthly.

NATIONAL TECHNICAL INFORMATION SERVICE

References to all unrestricted U.S. government sponsored research and technical reports, representing over 300 agencies. 1964 to present; updated biweekly. (Printed counterpart, Government Reports Announcements and Index.

NEWSPAPERS AND PERIODICALS

APA Monitor

The monthly newspaper of the American Psychological Association. Announcements of new programs and grants in psychology and mental health are listed in a regular column, "News and Notes". Federal programs affecting mental health are covered in the "Legislative Update" column.

California State Contracts Register.

A semi-monthly listing of State requests for proposal for a wide gamut of services and products, ranging from employee counseling to provision of balloons for the California State Fair.

Chronicle of Higher Education.

Comprehensive, up-to-date coverage of fellowships and grants, awarded or available. Weekly.

Federal Register

Daily news of Federal activities, including regulations, guidelines, priorities, legislation affecting grant programs. Experienced writers of Federal grants consider this top priority reading.

Foundation News.

Bi-monthly journal covering current issues in charitable giving. Includes useful book reviews.

Grants Memorandum.

An irregularly issued publication of the Grants Section, California Department of Mental Health. News of current legislation, available grants, funding trends, recent publications, workshops, etc. Free from the Department, 1600 - 9th St., Sacramento, CA 95814. (916)323-8331.

Grantsmanship Center. News.

Published six times per year. Covers program planning, grants fund raising, and nonprofit management. Has columns on "New Publications," "Funding Notes," and "Federal Regulations".

Health Grants & Contracts Weekly. Arlington, VA: Capitol Publications.

A current newsletter of Federal project opportunities in the health field.

BOOKS: GRANTS AND PROPOSAL WRITING

Grantsmanship: Money and How to Get It. 2d ed. Chicago: Marquis, 1978.

A brief overview of the process of finding and applying for grants. Discusses the Catalog of Federal Domestic Assistance in detail.

Hall, Mary. Developing Skills in Proposal Writing. 2d ed. Portland OR: Continuing Education Publications, 1977.

A very detailed guide for novice grant writers. Includes sample letters of inquiry, preliminary proposals, budgets. A first choice among the how-to-write-a-grant books.

Kurzig, Carol M. Foundation Fundamentals: a Guide for Grantseekers. Rev. ed. New York: Foundation Center, 1981.

An essential tool for foundation fundseekers. Includes a detailed description of the publications and services of the Foundation Center.

Lefferts, Robert. Getting a Grant in the 1980's: How to Write Successful Grant Proposals. 2d ed. Englewood Cliffs, N.J.: Prentice-Hall, 1982.

Provides a set of principles, methods, and guidelines to follow to write effective proposals. Includes a glossary.

White, Virginia P. Grants: How to Find out About Them and What To Do Next. New York: Plenum, 1975.

A general guide for the inexperienced grant seeker. Describes sources of funding information and goes through the phases of the application process - inquiry, preapplication, the final proposal, now grants are awarded.

Many other fund-seeking how-to books are in the libraries' collections. Check library catalogs under the following headings:

ENDOWMENTS - UNITED STATES - DIRECTORIES
FEDERAL AID TO RESEARCH
FUND RAISING
GRANTS-IN-AID
HUMANITIES - RESEARCH GRANTS - UNITED STATES - DIRECTORIES
PROPOSAL WRITING IN RESEARCH
PROPOSAL WRITING IN THE SOCIAL SCIENCES
RESEARCH GRANTS - DIRECTORIES
RESEARCH GRANTS - UNITED STATES
RESEARCH - UNITED STATES - FINANCE
SCHOLARSHIPS - UNITED STATES - DIRECTORIES
SUBSIDIES

OTHER RESOURCES

RURAL INFORMATION CENTER
National Agricultural Library, room 304
Beltsville, Maryland 20705
(301) 344-2547

Provides information and referral services to local government officials, businesses, community organizations, and rural citizens working to maintain the vitality of America's rural areas.

APPENDIX C - References to Aid in Selecting a Fund-Raising Consultant

CHOOSING FUND-RAISING COUNSEL

Interview Questions:

About the Firm:

1. Size of firm/Background ?
2. Experience of firm and firm's principals
3. Philosophy of firm ? Strengths ?
4. What are the advantages/disadvantages of using a firm which has/has not done recent work in our community ?
5. Is your firm a member of any professional organizations ?
6. Does it subscribe to a written code of ethics ?
7. Will you provide references from volunteers and staff on studies and campaigns on which you have worked ?

About the Consultants :

1. Who will conduct the study ? How many people from your firm will be involved with our organization and what role will each of them play ?
2. What are their particular qualifications and experience as development professionals/consultants ?
3. Have you worked on any studies or campaigns that you would consider a failure ?

About the Study :

1. How will your firm conduct the study ?
2. Why is your method/strategy the best or most accurate ?
3. What will a feasibility study accomplish for us ?
4. What sort of track record does your firm have with similar studies ?
5. How does a study identify campaign leadership ?
6. What would you do if your interviews did not seem to be providing conclusive evidence ?
7. Can a feasibility study determine volunteer and staffing requirements for a campaign ? Will that be included in your recommendations ?
8. What timetable would you suggest for planning and conducting the study ?
9. When could we expect to receive your report and recommendations ?
10. What materials would you need to conduct the study ? What will be the role of our organization prior to and during the study ?
11. How are the interviewees identified and selected ? Who schedules the interviews ?
12. What is the cost for your firm to conduct the study ? What expenses and other costs will there be ? What are the payment arrangements ?

13. What sort of lead time do we need between the study and the campaign ?
14. From what you already know about our organization, do you feel we are proceeding in the right direction with our planning ?

About Capital Campaigns:

1. What are the most important considerations in planning for a capital campaign ?
2. What sort of campaign services does your firm provide ?
3. What are the advantages in employing your firm to provide campaign management services ?
4. How would the best relationship between your firm and our organization be determined ?
5. For a campaign of this size, do you usually recommend fulltime or parttime counsel ?
6. When you have provided services throughout a study and campaign, what have your results been ? Is this different from when you conduct the feasibility study only ?
7. What do you charge for campaign management services ? What would an average campaign budget be ?
8. Does your firm provide other services such as volunteer training, writing, design, research ?

How To Interview A Consultant

There is an art to interviewing fund-raising consultants. Knowing the right questions to ask and properly judging the answers can save a host of problems later on.

By Arthur D. Raybin, president
Arthur D. Raybin Associates, Inc.

Are you ready for today's "beauty parade" — appearances by consulting firms every half hour? Do you think that this group will know how to make a decision?

— Comment made by a consultant as he completed his meeting with a selection committee.

An effective selection committee will avoid a "beauty parade," but will conduct its interviews with carefully prepared questions that force a firm to reveal its strengths and weaknesses.

What is Really Important?

Using carefully prepared questions, you can gather lots of information about a prospect during an interview. From that information you will be trying to answer these questions:

- Will this consultant understand us and mesh well with our consituents?
- On the other hand, will the consultant be too comfortable (fine for the study but unable to push and prod us later)?
- How flexible are these peopie? How will they react when everything — needs, goals, public relations problems — changes during the study or the campaign itself?
- Will we have confidence in the prospect's recommendations and be willing to act on advice?
- Do we really know what this will cost?
- Will the consultant give in too easily when we push back?
- Is the prospect too classy (or too dull) for our constituents? Either way, will it make any difference in how much we raise or how long it takes to raise it?

Mutual respect: a consultant's experience. The chairman of one selection committee let me know in advance that we were being interviewed because we had a reputation for being tough, for pushing what we believed to be the most successful approach no matter how many board members initially objected. So we acted accordingly during the interview and won the assignment. Later, another board member said that the chairman had told him, following the interview: "We need him to do the job for us, but I certainly wouldn't want him as a luncheon companion." The lesson is clear. Consultants must prefer respect over camaraderie. And you too must be prepared to choose the consultant you respect, not just the one you find personable and friendly.

Starting the Interview

The Setting. Conducting an interview as graciously and comfortably as possible is important. If you sit at one end of a long table and the consultants sit at the other, a we-they situation is created. Intentionally or not, the interviewee will be on guard. A better plan is to leave vacant chairs interspersed with those of the committee. The consultants will feel part of the group — a sentiment necessary if the two parties are to work together.

Opening Statement and Review. Begin the interview by explaining what your institution is all about and where you hope it is headed, including the preliminary planning that preceded this meeting. The consultants should then be asked to provide background on their firm and the general approach they would take in working with the organization. But do not dawdle here — both sides can accomplish this in about 15 minutes. You want to move quickly to your key questions.

Sample Interview Questions — Strong And Weak Responses

Your questions should be prepared in advance — not just to provide the committee with a check-list, but because you want to be sure to cover the same ground with each firm. When developing your questions, you will, of course, want to find out what the prospect will do and how work with the prospect will proceed. However, keep in mind that you can learn as much by seeking out what consultants *will not* do — will they be pushed and intimidated by your board or stand up for what's prudent and wise? Will they recognize new input and adjust, or proceed blindly with the initial plan? The following is a set of sample interview questions, along with examples of "strong" or "weak" responses you might hear. Of course, these questions are only models, not the exact set you will prepare. Comments on the responses appear when appropriate.

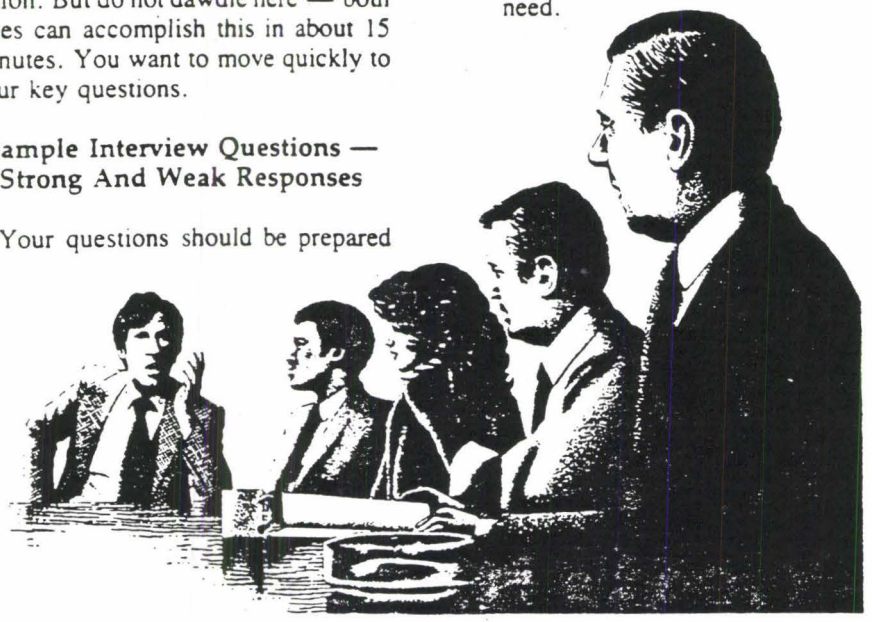
QUESTION: Tell us what you have done in situations similar to ours.

Strong Response:

Institution X, with a similar donor base, had never raised more than $2 million, but its long-range plan called for $7 million. In the study interviews we pointed this out, worked at raising sights, and watched key donors talk themselves into viewing the institution from a fresh perspective.

Weak Response:

Every situation is very different. You are talking about a school; we have done a museum that seems similar in size, scope and need.



Comment:

The strong response deals with fund-raising tactics and the institution's concerns; the weak response speaks to types of institutions and has nothing to do with what is really bothering the committee.

QUESTION: What would you do if your interviews did not seem to be providing conclusive evidence about giving potential?

Strong
Response:

We would meet with you quickly to see if the interview questions were creating a problem, if the preliminary goals could be stated differently, or if we were seeing the wrong people.

Weak
Response:

Once you get started, all of the interviews must be completed so that we can give you an accurate report.

Comment:

The weak response shows lack of flexibility and more interest in producing a product (report) than in helping an organization raise money.

QUESTION: If we were to engage your firm, who would be working with us?

Strong
Response:

Those of us here for the meeting today.

A study director on our staff — with whom you would meet before we begin our work, of course.

Weak
Response:

It's difficult to tell right now, it really depends on who is available when we are asked to serve.

Comment:

In a matter of such importance to the institution, wouldn't you want to know who would be making the first approach to the important prospects?

QUESTION: Have you had any failures?

Strong
Response:

Yes. We are on target with our projections about 85 percent of the time; at institution Y we were convinced from interview responses that the case was well-received and compelling. In the drive itself we found that donors felt no sense of urgency about the matter. We had misread their comments.

At institution Z, only half of its goal was realized during the campaign; the second 50 percent dribbled in over the following two years. We had misread the constituency's readiness for the drive.

Weak
Response:

Campaigns do fall short every now and then, but the reasons are almost always unpredictable — the lead donor dies, there is a change in staff leadership, or the volunteers don't cooperate.

Comment:

If the consultants can't figure out why things went wrong elsewhere, how will they ever recognize mistakes and profit from them?

QUESTION: What would you do if a donor made negative comments in the study about this organization's leadership?

Strong
Response:

We would encourage interviewees to meet with the board's head, unless it was that person who was the problem — then we would meet, on a confidentia basis with that person.

On more general matters, w would go back to the committe that had selected our firm.

Weak
Response:

Nothing, until we covered th problem in our written report t the trustees.

QUESTION: Will you prepare all o the printed material for our pro gram?

Strong
Response:

Yes, we are a full-service firm.

No, we just counsel. Of course we help in drafting material an work closely with your staff an outside publications people; bu we want to focus first an foremost on fund raising, whic is our speciality.

Weak
Response:

Of course; we can do just abou anything you ask of us.

No, we don't like to get involve with printed material.

Comment:

How would you feel if the inter nist who diagnosed the need fo surgery offered to perform th operation himself, instead of re ferring the case to a surgeon?

QUESTION: How long will it take Will you be able to speed things u for us?

As president of Arthur D. Raybin Associates, Inc., Chappaqua, New York, Arthur Raybin has worked with more than 120 gift-supported institutions as a consultant on capital campaigns. This article has been adapted from his book, *How To Hire The Right Fund Raising Consultant*, being published this month by the Taft Corporation, Washington, D.C. Campaigns with which the firm has been associated range in size from $750,000 to $1 million, and clients have included such gift-supported institutions as the Metropolitan Opera, Mt. Holyoke College, Columbia and Harvard Universities.

Strong
Response:

Studies usually take three months; this much time is needed if they are to be done properly. The campaign to follow might take as long as nine months to complete.

If we try to go faster, we may well miss some of the best prospects — or not give them enough time to reach thoughtful and generous decisions.

Weak
Response:

We can go through each step just as rapidly as you request.

If there is a reason to rush, we'll just cut back on the number of interviews.

Comment:

The strong answers acknowledge valid and important considerations; the weak responses demonstrates lack of integrity, judgment, and professionalism.

QUESTION: Do our basic objectives make sense to you? How would you express them differently?

Strong
Response:

Please give us a few days to rework the list and set it forth in terms that might make more sense to those being interviewed.

The categories are confusing.

Let's separate endowment and construction items.

Weak
Response:

They are just fine and we know that interviewees will react well.

QUESTION: What about competing campaigns of other institutions with the same constituents?

Strong
Response:

If you really don't need the funds now, consider delaying the study.

If the need is urgent, we will find out in the study if the competition is overwhelming or if all ships in the community will be lifted on the same rising tide.

Weak
Response:

Don't worry about them.

QUESTION: Can you tell us what really happens during a study interview?

Strong
Response:

Yes. Let me give you the basic questions we would ask, so the committee can go through a simulation of the process right now.

Weak
Response:

You are so unique that we would need to figure out what to ask.

Comment:

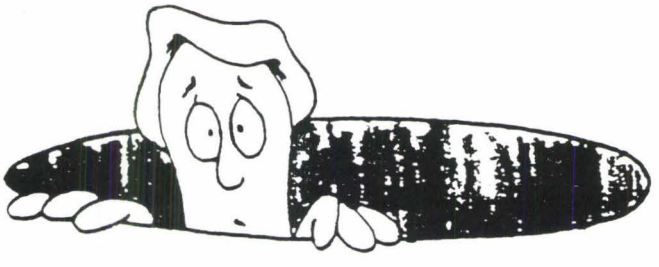
An inability to think quickly and act accordingly will hurt the cause when and if the weak response consultant is out in the field conducting interviews.

QUESTION: Why can't we start without a study?

Strong
Response:

Faced with a similar situation in

Trying to get out of a hole?



Or simply trying to improve your present position?

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(312) 824-8065

LOS ANGELES
1313 Foothill Blvd., Suite 8
La Canada, CA 91011
(818) 790-8[illegible]

business, would you proceed without a market analysis?

Do you really want to make an investment of time and money without an objective evaluation of the odds?

Weak
Response:

If you insist, we will be glad to plunge right into a campaign with your organization, provided it is clear that we are not responsible for the feasibility of the goal.

Comment:

Who would want a consultant who didn't stand up for the right way?

QUESTION: How much will all this cost? How would you expect to be paid, and when is each installment due?

Strong
Response:

Our fee would be X dollars for the study, approximately Y dollars in expenses, and Z dollars for counseling. We will spell out, in writing, what you can expect from us in each stage.

For the study, we would want one-third of the fee at the outset, and then payment of the balance as follows.

Weak
Response:

Well, our study will be *X*, but it is not possible to estimate how high expenses will go. Then there are a few extra charges for a campaign plan and for a case statement.

Of course we would expect most of the estimated total before we begin.

Comment:

Straight talk and honest answers, such as the strong response, are needed when the subject is money. If you don't understand what is being said or meant, move on to the next candidate.

QUESTION: Is this an appropriate assignment for your firm? Do you have time to do it?

Strong
Response:

Yes, we have the time and staff available. We have done similar projects and will be able to bring much useful experience to bear.

Our experience with similar situations is limited, but our record indicates that we do well in new areas, and would bring our best efforts to this assignment.

Weak
Response:

We can squeeze it in — no problem.

Our firm does well, no matter what the field.

QUESTION: Is there potential for a conflict of interest if you work with us and continue, at the same time, to provide assistance for X?

Strong
Response:

There is no conflict of interest for us. We do not solicit, and information about the prospects is not taken from one study to another. But if we cannot convince you that this is so, we would never have a comfortable relationship. Conflict of interest is in the eye of the beholder.

Weak
Response:

Of course not; don't worry about the question.

QUESTION: How can we best check your references?

Strong
Response:

Here is a list of every client we have served; feel free to check with board members and staff at all of them. You might want to ask X this question; we did not do so well with Y because...

Weak
Response:

There is no need to spend time calling trustees; staff officers on the list we will send to you can give you the full story.

Comment:

Those who obfuscate, confuse, or worm their way around on this item will only cause trouble later.

QUESTION: How about travel and other cost? How will we be able to control that?

Strong
Response:

Together, we can estimate them in advance and build them into a fee — or agree not to go beyond X dollars. You will control everything; expenses will be billed separately for travel you authorize.

Weak
Response:

Don't worry, we will hold them down.

Comment:

This seemingly trivial question can be particularly important. Most firms will work with an organization to establish an interview schedule covering areas of the country where prospective donors must be seen. By retaining final control and approval, you can make certain that costs for such travel do not exceed an agreed-upon budget. Some firms approach the matter differently, estimating in advance almost all of what will be involved and adding it to the fee for conducting the study. "We can see those 60 people at a cost of X dollars. Our travel costs, except for anything over 1,500 miles, will be Y dollars; so your total fee, for the study, will be X + Y + any long distance travel." Then there is no haggling later over charges, and the firm is not burdened with expensive accounting chores.

All too often, someone on the committee will insist on asking these questions:

- Can you tell us how much you have raised for each of the institutions you served?
- Can you apply a formula and tell us what our goal should be?

Neither question is useful. In the first instance, consultants do not raise money. They help. Success comes when the partnership (staff, volunteers, counsel) pulls together. So the answer is simply the "institution X raised Y dollars." In the second instance, one has to ask "which formula?" If all capital campaigns for construction and endowment support could reach 10 times

what the same donors contribute annually, that would be a yardstick. But at some institutions the factor can easily go to 20 or more. The study is needed to pinpoint a more precise figure. And we know, further, that goals cannot be projected on the basis of a school's enrollment, an agency's client roster length, or an orchestra's subscription base. Each situation is different.

Estimating Expenses

A note on expenses is important here, for the fees are an important topic in the interview and will influence some of your questions. Although it is difficult, at the interview stage, for a committee to add up what the total costs will be in using consultants, here are some angles to consider.

- Who will be doing the interviewing in the precampaign study? Obviously, an experienced senior officer of a firm commands a higher fee than a junior type who has just been hired by the consulting organization.

- Does the firm plan to offer the study as a "loss leader" — knowing that the unprofitable interviewing process will be followed by a much more profitable period when resident direction is supplied?

- Is each firm offering the same services in a study and for campaign counseling? If it is difficult to tell, ask tough questions.

- Are the fees negotiable? Of course, but within reason. Remember that no reputable firm will charge less than what it is charging a neighboring, similar, or competing institution for the same services. If the work is reduced (by conducting, say, 50 instead of 75 interviews), you may not be economizing intelligently, as some very key prospects will not be seen. And at a reduced fee the firm may not be able to assign its best people.

Beware of bargains. The investment in a consulting firm is relatively small — especially when your urgent objectives require such substantial giving.

Concluding the Interview

To close each interview, the chairman should explain how the committee will make its decision. Tell each prospective consultant how long the process will take. If additional written material is being requested, be sure that both parties understand when it is due and what is to be included, e.g., notes on conduct of the study, services to be offered after the study, fees and payment schedules and background information on staff experience in similar situations.

And do not be afraid to let the candidate know how many others — and who — are being considered. If it is clear to the committee that the firm being seen is not right at all for the assignment, you should say so immediately. •

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Some Good Questions to Ask Fund Raising Consultants Who Would Like to Serve Your Institution

If a Consultant Tells You That...	Ask Him...
...with his help you can raise far, far more than you've ever raised before.	...for tangible evidence that this is true, and for the recent record of his firm in supporting that assurance.
...he or a colleague can make calls once or twice a month which will generate as much money as you could raise from an organized, professionally-directed campaign.	...for specific instances in which this has been done (don't accept the names of efforts now under way whose final results are not yet known).
...occasional counsellor service is as productive as full-time direction.	...since when did the fractional attention of anyone to a difficult problem surpass in value the concentration of his time to solving it?
...his firm's staff members are widely experienced and thoroughly trained.	...who trains them, for how long, and what are his firm's supervisory policies?
...his firm has vast experience in the type of campaign which you are planning.	...for specific examples.
...your officers and trustees will not have to do much work in the proposed campaign.	...who he's trying to kid.
...he will conduct a thorough feasibility survey for nothing.	...whether that's what it's worth.
...his firm will direct your campaign on a percentage basis.	...why he is not a member of the National Society of Fund Raising Executives whose code of ethics prohibits such a practice.

We will be delighted to answer your questions about...

Ketchum Canada Inc.
Fund Raising Counsel

CAPITAL CAMPAIGN FEASIBILITY STUDY INTERVIEW SURVEY

Rating (0-5)

FIRM: _____

1. In 10 minutes or less please describe your firm including:

   a) How long you have been in Business _____

   b) How many people you employ _____

   c) Who owns the firm _____ _____

2. Is your staff:

   a) Full-time or part-time? _____

   b) On contract or receive salary? _____

   c) Do you hire stringers or full-time directors? _____ _____

3. Does your firm provide a full-time person for a feasibility study? _____

   a) How long does the feasibility study usually take?

   _____

   b) Are interviews conducted person-to-person or by mail? _____

   c) Do you provide full-time on-site personnel?

   _____ _____

4. Please describe your most successful appeal within the past two years:

   _____

   _____

   _____

   _____ _____

5. Specifically, what did your firm contribute to this success:

   _____

   _____

   _____

   _____ _____

11. Do you accompany clients on major gift visits?

12. Describe how you would staff the appeal and how you would handle complaints about the performance of your employees:

If we request dismissal of the director, would you comply?

13. Are you willing to give us references on the person you select as director?

14. Please discuss your <u>least</u> successful campaign (without using proper names) and how you would handle the situation differently if you had a second chance.

15. What mistakes do professional firms most often make as they serve their clients/

20. Who would have ultimate responsibility in your firm for our study and/or appeal and the relationships between your staff and our workers and leaders?

_____ _____

_____ _____

_____ _____

_____ _____

21. Describe the follow-up program, including the pledge redemption system, that you envision for our appeal.

_____ _____

_____ _____

_____ _____

_____ _____

22. Please discuss your fee structure for both the feasibility study and the appeal itself.

_____ _____

_____ _____

_____ _____

_____ _____

23. Describe the feasibility study you would conduct for Concordia College, Bronxville.

_____ _____

_____ _____

_____ _____

_____ _____

24. Describe how you would envision the transition from the feasibility study to the actual appeal.

_____ _____

_____ _____

_____ _____

_____ _____

November 29, 1988 TOTAL POINTS: _____

Selecting precisely the right fund raising firm for your program is one of the most consequential decisions you will make. No easy problem, this. There are many excellent firms. Among the really good companies, there is perhaps one with the special characteristics, and a combination of skills and talents, that most nearly matches your singular needs. This Work Sheet will help you analyze and evaluate the firms you interview—and help you choose the most effective fund raising counsel possible for your project.

Name of firm:

Name of Representative:

Personal characteristics of the presenter: Appropriateness of dress, directness, enthusiasm integrity, response to questions, etc.

Notes:

Will the Representative be directly involved in our program?

Yes ___ No ___ How:

Your Name: _____

Note: It is most effective if you take at least fifteen minutes following the presentation to discuss the services, depth, and characteristics of the firm. What sets it apart and makes it uniquely suitable for your program. Then complete the Rating Profile on the back page.

Important Items for Discussion or Consideration

You may wish to consider many of these factors in making your decision. Make notes in the right hand column.

Notes:

Experience of the Firm

1 With institutions similar to ours

2 In cities such as ours

3 In our city

4 In a broad range of situations and a variety of institutions

Involvement of Firm's Staff

1 Time commitment of supervising or lead officers

2 Who will conduct feasibility study

3 Who will be available for residence service for the capital campaign

4 Evidence of quality back-up staff and services from the main office

Feasibility Study

1 When can it start

2 How much of our staff's time is required

3 Evaluation of a sample study . . . is it detailed, innovative, perceptive

4 How long will the study take

5 How many interviews

6 Rationale given for number of interviews

7 Type of information the feasibility study will provide us

How do you rate the firm? You should seek a "100 Point" Partner for your Project! Or come as close to 100 points as possible. Use the profile below to make your evaluation, and tally the ratings. Give a grade for each criterion.

0 = Unacceptable 1 = Fair 2 = Average 3 = Good 4 = Very Good 5 = Excellent

1	Preparation for our presentation	=
2	Interest in our program	=
3	Past performance for similar organization such as ours	=
4	Sensitivity to our organization and its mission	=
5	Compatibility with our community	=
6	Experience in communities such as ours	=
7	Aptitude for assessing our program in a feasibility study	=
8	Supervision provided by Home Office	=
9	Staff resources appropriate to our needs	=
10	Capability to handle our type and size of campaign successfully	=
11	Skill to interpret our work and service	=
12	Ability to develop proper campaign material	=
13	Innovative plan for our particular situation	=
14	Creative energy and commitment we can expect from Home Office	=
15	Flexibility of services and campaign strategy	=
16	Proper size firm for our program	=
17	Ability to work with our leadership— staff and Board	=
18	Willingness to respond quickly to our needs	=
19	Acceptable fee*	=
20	Credibility and integrity of firm	= _____

Total Rating: _____

*In fund raising, the cheapest is not always the least expensive

Total Rating:

100 Points —You have a sure winner!
80-99 —Very good to excellent
70-79 —Only average
69 or below —Should probably not be considered

© SELECTING THE RIGHT FUND RAISING COUNSEL and the RATING PROFILE, 1987

Cost s and Requirements

Notes:

1 Fe asibility study

2 Re sident campaign costs

3 ( )ther staff costs

4 What staff from the firm will be provided

5 Office space requirements

6 Computer requirements

Contract Provisions

1 Costs clearly specified

2 Performance and quality specifications

3 Termination or postponement

Management Methods and Tools

1 Regular reporting and monitoring of results

2 Supervisory calls by lead officers of the firm

3 Role of our staff

4 Role of our Board of Directors

Innovation and Ideas

1 The firm's skill in turning problems into opportunities

2 Ability to identify with our mission

3 Capacity to perceive dynamics of our institution

4 Ability to communicate effectively with broad spectrum of our community

5 Enthusiasm for this project

6 Does firm share our ethos

7 Quality of firm's sensitivity, graphic design and writing capability

How Can You Be Sure You're Ready

In fund raising, pre-campaign preparation is not only important—it is everything. Your program will be won or lost months before the opening kick-off meeting.

If your institution is planning a campaign for funds in the near future, here are vital questions which will help determine your readiness. They are essential to the success of the effort.

If you are not certain of the answers to all of the questions, you are not ready for a campaign. There is a method of obtaining the information you need to get ready for a capital effort: a pre-campaign study.

At Jerold Panas, Young & Partners, we call this a Feasibilty/Developmental Analysis, and we conduct it in a manner uniquely our own. An F/DA is the one certain way to answer all of the nine vital questions and determine your readiness for a campaign. And best of all, if done properly, it can also be an immensly effective step in a continuing cultivation program.

	Definitely	Perhaps	Not Certain
1. Is there wholehearted agreement among the Board of Directors and the staff concerning the worthwhileness of the cause?	☐	☐	☐
2. Are the Board and Staff determined and committed to the success of the project? Are they interested enough to make personal sacrifices for the campaign—both in time and money?	☐	☐	☐
3. Is your institution well regarded and highly respected in the community? Are your services considered important and relevant?	☐	☐	☐
4. Is there a valid and urgent need for the funds? Is the case one which can be dramatized easily and effectively for emotional appeal?	☐	☐	☐
5. Is top-level leadership available and interested in the project?	☐	☐	☐
6. The largest gift—the initial one, if possible—should be for one-tenth to one-sixth of the campaign goal. Will this be possible? Can one-half of the campaign goal be secured from ten to fifteen donors; can sixty-five to seventy-five percent of the goal be secured from approximately one hundred donors?	☐	☐	☐
7. Can a sufficient corps of enthusiastic and dedicated volunteers be enlisted and trained to work on the project?	☐	☐	☐
8. Is the timing and planning of the campaign sound?	☐	☐	☐
9. Once the building project has been completed, are there resources available to provide the annual support which will be necessary?	☐	☐	☐

Up to thirty-five copies of THE NINE VITAL QUESTIONS are available to Institutions for use with Board Members and Committees. All or any portion of the message may be used without permission.

JEROLD PANAS, YOUNG & PARTNERS INC.

Development Planning & Campaign Management • Institutional Public Relations • Design Communications

500 North Michigan Avenue, Chicago, Illinois 60611 • 312-222-1212 • Offices in San Francisco and Sydney

CHOOSING THE RIGHT PERSON TO CHAIR YOUR CAMPAIGN

Selecting and recruiting precisely the right person to head your campaign program can be one of the most important decisions you make – a determining factor of the greatest significance for the success of your project.

Listed on this sheet are twenty-one criteria, essential characteristics in seeking a person to head your program. Grading is on a "one" to "ten" basis – 10 being the highest mark. While perfection may be impossible, you should certainly seek the most effective person available. A perfect rating is 275.

The criteria are not listed in order of priority, although several are given added "weight" because of their importance.

For ease and flow of language – and for that reason only – we have used the male pronoun throughout the document. Obviously, women should be considered for this important post. Please substitute He or She where you see "He" – Him or Her where you see "Him."

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ten being the highest

1. He is an outstanding citizen, a well known and respected civic leader. **(Count two times the rating.)** _____
2. He occupies the top position in his firm, or at least no less than the next highest position. _____
3. Because of the kind of a man you seek, his business and his pleasures may often take him away from the city. This need not be a deterrent. The important factor is that when he is in the city, he has some flexibility and "give" in his schedule. _____
4. He should not be the President of your institution and often, it is desirable that he is not currently a member of the Board. _____
5. It is highly desirable that the candidate be knowledgeable about the institution but even this need not be necessary if he is willing to take the necessary time to learn about the program. _____
6. The person should be a good public speaker – though he need not chair every meeting. Most important, he must be sincere and convincing when he speaks about the institution. _____
7. He is the man in the community to whom it is the most difficult to say "no" **(Count three times the rating.)** _____
8. He has the ability to make or affect a number of major gifts. **(Count three times the rating.)** _____
9. He has those characteristics in his personal and business life which makes his identification with the institution a desirable one. **(Count 1½ times the rating.)** _____
10. He is a willing and enthusiastic delegator of responsibility. _____
11. He has an office staff capable of handling some of the telephoning and details of the campaign. _____
12. He does not have a primary identification with any other similar institutions and he should not have recently chaired another major drive. _____
13. He is not retired although he may now have reached the point where he is not as active in his business as he once was. _____
14. He is willing to give the campaign priority in his personal, business, and civic schedule. **(Count two times the rating.)** _____
15. He is capable of seeing "the big picture" and leave details and office mechanics to the campaign staff. _____
16. He is a secure person with a healthy personality and a high level of self-esteem. _____
17. The candidate is willing to lend more than his name to the campaign, although his name in itself adds luster to the total effort. _____
18. He is conscious of deadlines and schedules. _____
19. He is a team man, willing to listen and work with others. _____
20. The person enjoys good health and stamina. _____
21. He knows how to use and encourage good staff work. _____
22. He must be capable of enduring an insufferable number of roast chicken dinners. **(Count no points!)** _____

TOTAL _____

_____

Name of Prospective General Chairman

262 - 275 points – An extraordinary choice. You cannot miss! Your campaign will be a success.

243 - 261 points – An excellent selection. Take all the care possible in recruiting this person. A victory is almost certain.

192 - 242 points – A good choice, but you may have some problems in recruiting some of the other leadership you require to reach your objective.

184 - 191 points – Marginal, but with the proper commitment and dedication, he may overcome deficiencies in other areas.

Choosing The Right Person to Chair Your Campaign is Registered by JPY&P

How to make certain you have a winning fund raising campaign

Guidelines to Winning

1. Not every fund raising firm, no matter how good, is right for every institution or every project. Be careful to choose the firm which most closely meets your standards and criteria. Develop a check-list of qualities you are seeking and use the list at every presentation during the interviewing process. A grading system with weighted points will be valuable.

2. Insist on a feasibility study. It is one way certain to assure a valid exploration of your assets and the problem areas. If a firm offers a free study, eliminate them out-of-hand. A free study is worth about what you've paid for it.

3. Beware of a study report which reads more like a sales document than a careful analysis of your market position. Insist on documentation and substantiation. If the Report recommends "achievable objectives," demand to know why and how. Ask for proof, or look for another firm.

4. Evaluate your board with excruciating candor. The buck starts there! If your directors don't have the muscle, influence, and financial resources to mount a campaign, you have problems. You will probably have to recruit a surrogate group and that may not be easy.

5. Top leadership is crucial. If you can't recruit the influentials to your effort, you should postpone your program until you can win them for your cause.

6. A campaign is won with large gifts. No matter what your goal, the largest dozen or so gifts must represent about a third of your objective. The next 100 gifts, another third. There have been exceptions to this rule, but darn few. Don't count on it.

If the feasibility study doesn't show how these large gifts can be wooed and won to your project, and identify the sources, be wary. The odds are against you.

7. Dare to ask. You'll be hurt more by those who would have said "yes" but were not asked than by those who say "no".

8. Your project must have sizzle. People don't give to needs. They give to bold ideas and inspiring ideals. Test your case for funds carefully.

9. Those who know you best of all, love you most of all. Those who know your institution well are four times more likely to have a favorable opinion. If you haven't been doing a consistently good job of interpretation and cultivation, you won't be able to perform instant-magic. Remember the admonishment: "You don't make a pickle by sprinkling a little vinegar over a cucumber. You have to immerse it."

In fund raising, pre-campaign preparation is not only important—it is everything. Your program will be won or lost months before the opening kick-off. We have prepared a piece called Ten Vital Questions which will determine your readiness and help assure the success of your effort. Write or phone for 35 copies. FREE. We would also be pleased to send you 35 copies of this monograph, How To Make Certain You Have a Winning Fund Raising Campaign.

10. The cheapest is not necessarily the least expensive. Fund raising is bottom line focused. The emphasis must be on how much you raise, not how much you spend. The difference between the two is what really counts.

11. Pin down time commitments. The officer of the firm you prefer may have made a dazzling presentation. We have made a few in our time! But if you choose the firm because of the person who made the presentation, make certain you understand precisely how much time he will devote to your project. Before you sign a contract, be sure the commitment is specifically outlined.

12. Insist on detailed progress reports on a regular basis. Have strategy meetings on at least a weekly basis to monitor progress. If the campaign is not meeting its action-calendar and game plan, find out why. Heed the warning signals. A problem campaign can almost always be detected early. Don't wait until it's too late. Be quick to call in the firm's officer and supervisor. Ask some hard questions and demand action.

13. Be Bold. Resist the usual, conventional and commonplace. Raising funds in today's world requires strategic and imaginative planning. There are some campaigns where the old rules and standards still apply, but these situations are few and far between. Seek a firm which is flexible enough to adapt its greatest talents and human energies to your unique situation.

In the past ten years, JPY&P has served over 600 client-institutions. We've learned a lot.

There's a small percentage of our work that has generated absolutely block-busting campaigns. As exciting and explosive as any firm in the business. We've had some that have raised more than twice their goal. These are the campaigns we like most to talk about. Fund raisers are like that!

And let's face it: a small percentage of our programs were...well, they were bad. That's the truth of it.

The great majority of our campaigns are somewhere in between. Mostly better than good.

There are few really exceptional firms in the business. We are proud that most of our past clients would place us in that elite group. We've worked darn hard to merit that recognition.

In the course of these years, we have learned a lot about managing a successful campaign. There are no guarantees. That's unfortunately true. But there are some verities which provide inviolate bench-marks to winning. You'll find that few of these are new to you. But you will be interested in reading what we have learned. Perhaps a careful review will help assure the success of your next fund raising program. Write or phone us if you would like copies of this monograph to distribute to your Board.

J.P.

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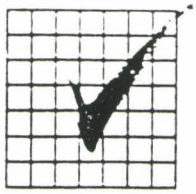

How to choose the right fund raising firm

Guidelines to Winning

There are a number of good fund raising firms. A handful are outstanding. And a few are absolutely great. Among this latter group there will be one which is precisely right for your organization and situation. Here are fifteen factors which will help in establishing your guidelines to winning.

1. **Interview at least two or three companies for your program.** The good firms share many qualities in common but there will be subtle variations. And it will be those factors and characteristics which will make the consequential difference in your program. Mark Twain said: "They may sound much the same but it could be the difference between a lightning bug and a lightning rod."

2. **Develop a checklist of the criteria and services you are seeking and use the list at every presentation during the interviewing process.** A grading system with weighted points will be valuable. Make certain that each member of your Selection Committee can be present for every presentation.

3. **Provide sufficient time for a complete presentation and a thorough question and answer period.** Anything less than one hour is not in your own best interest. Immediately following the interview, after the presenter has left, take some time to discuss the features and advantages of the firm and make an evaluation and appraisal.

4. **Check carefully the firm's record.** Does it have extensive and successful experience in working with other institutions similar to yours. Ask for references and call to find out what they have to say about the firm you are considering. In some ways, fund raising companies are like runners—among them are sprinters, and some run the marathon. Both are valued for their own contest. Determine which firm is best for your particular program.

5. **Make certain the firm shares the same ethos as your institution.** The same philosophy. The same sense of mission. Not every company, no matter how sterling, is precisely right for your institution. Be careful to choose the group which most meets your standards and criteria. Ask yourself if you would be proud to have the firm represent your organization to your constituencies and community. Good firms work within a rigid framework of principles which guide their relationships. Ask for it in writing.

6. **Insist upon a thorough analysis to determine the feasibility of your program.** It is the one way certain to assure a valid exploration of your assets and any problem areas which might exist. If a firm offers a free study, eliminate them out of hand. That kind of a study will be worth about what you pay for it.

7. **Ask to see a copy of a Feasibility Study the firm has done for another client.** This should probably be one from an organization totally unfamiliar to you and your group in order to protect the confidentiality of the report. Review it carefully. Mies van der Rohe said that "God is in the details." See if the study report is detailed and specific. Look for innovations and an analysis which develops the full potential of a campaign program. If the study reads like a sales document, you will probably be choosing the wrong firm.

8. **Be clear and specific about time commitments.** The officer of the firm you prefer may have made a dazzling presentation. We have made a few in our time! If you choose the firm because of the person who made the presentation, make certain you understand precisely how much time he will devote to your project. Before you sign a contract, be sure the commitment is outlined specifically.

9. **There is no particular virtue in size.** The biggest firm is not necessarily the right one for you. But the firm should be large enough to have a team of able and skilled people. They should be able to provide strong capabilities in necessary research, planned giving, and foundation search.

10. **The capability to communicate effectively and dramatically is essential.** Sizzle! Choose a firm with the kind of talent that can design and write exciting and compelling campaign literature. Material that motivates and causes people to jump over fences they never thought possible.

11. **The firm should have a program for providing you with detailed progress reports on a regular basis.** Strategy meetings should be held at least weekly to monitor progress. If the campaign is not meeting its action-calendar and game plan, be certain the firm's supervisor is willing to return to your community for a meeting at your call. Find out how the firm monitors its program from the home office and how many supervisory visits are planned. Put it in the contract.

12. **Look for a firm which demonstrates vitality and boundless enthusiasm.** These attributes will not necessarily win your campaign, but they will go a long way in motivating leadership to greater vision and bolder dreams. Choose a firm "with spring in its heels."

13. **Choose a firm willing to be bold and venturesome.** The conventional and commonplace will often not be good enough for your program. What is required is innovative strategy and imaginative planning. Old rules and standards may not apply in your situation. Flexibility and creative application are operative factors to success.

14. **Although cost is an important factor, do not necessarily choose the cheapest.** It may not turn out to be the least expensive. Fund raising gives a high priority to the bottom line. The emphasis must be on what you raise, and not necessarily how much you spend. What counts is the difference between the two, and meeting your net objective.

15. **The firm should bring to your program the same high sense of dedication and commitment as that which is expected from your Board and staff.** Nothing is more important to your organization than the winning of this campaign. Nothing. Your program should be more than just a professional puzzle to be put together. It should be close to a love affair.

Fund raising is a high adventure. It is an extraordinary celebration of art, science, and detail. And the greatest and most elusive of these is art. If you choose the right firm and your campaign is as successful as it should be, it will mark a high point in the history of your organization. It will provide some of the most exciting and exhilarating experiences you have ever known. Magic moments. Choosing the right firm can assure the funds you need and at the same time, generate a swell of good public relations which will accrue to your institution for years to come. We have a checklist which will be helpful to use during the actual interviewing process. Write or phone us today for up to thirty-five copies of this appraisal form. j.p.

Jerold Panas,
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APPENDIX D - Cradle of Forestry in America Capital Campaign documents

- Request for Proposal for CFA Capital Campaign Services, 11/88
- Feasibility Study, 5/88
- Request for Proposal for CFA Capital Campaign Feasibility Study, 1/88

REQUEST FOR PROPOSALS

Contract Title: Cradle of Forestry in America Capital Campaign Services

Date Issued: November 16, 1988.

Issued by: Cradle of Forestry in America Interpretive Association
1001 Pisgah Highway
Pisgah Forest, NC 28768

Address Offer to: USDA Forest Service
Attn: Don Fisher
1001 Pisgah Highway
Pisgah Forest, NC 28768

Solicitation: Sealed offers in original and five (5) copies for furnishing the services and supplies in the Statement of Work will be received at the USDA Forest Service address listed above, or if hand carried, to the Pisgah District Ranger Station on U.S. Highway 276, Pisgah Forest, NC, until 2:00 pm local time on December 21, 1988.

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SECTION B-WORK STATEMENT

The contractor shall furnish the necessary personnel, material, equipment, services, and facilities (except as otherwise specified) to perform the Statement of Work referenced in Section L.

SECTION C-PERFORMANCE & DELIVERY

This contract is anticipated to run eighteen (18) months. The contractor will be expected to begin contract services on or about January 18, 1989, but no later than February 1, 1989. Offers that propose beginning dates that do not reasonably fall within the applicable dates/times specified above may be rejected without further consideration.

SECTION D-CONTRACT ADMINISTRATION

The contractor will work for, and be paid by, the Cradle of Forestry in America Interpretive Association. However, the USDA Forest Service will provide a Contract Representative to administer the contract on behalf of the Interpretive Association. The designated Forest Service Contract Representative will evaluate contract performance and progress, approve completed work, and authorize payment for completed work.

SECTION E-METHOD OF PAYMENT

Payments under this contract will be made by check and issued by the Cradle of Forestry in America Interpretive Association. The Contractor shall forward the full name, title, phone number, and complete mailing address of responsible official to whom check payments are to be sent, in writing to:

CFA Interpretive Association
Attn: Business Manager
1001 Pisgah Highway
Pisgah Forest, NC 28768

no later than seven (7) days after contract award.

SECTION F-INVOICES

Invoices for completed work and expenses shall be submitted to the designated USDA Forest Service Contract Representative at the following address:

USDA Forest Service
Attn: Don Fisher
1001 Pisgah Highway
Pisgah Forest, NC 28768

To constitute a proper invoice, the invoice must include the following information and/or attached documentation:

(1) The name of business concern, invoice number, and invoice date.

(2) Description, price, and quantity of property and services actually delivered or rendered.

(3) Name, title, phone number, and complete mailing address of responsible official to whom payment is to be sent.

SECTION G-PLACE OF PERFORMANCE

The Capital Campaign Headquarters location, to be determined by the Forest Service at a later date, will either be in a USDA Forest Service office in Asheville or in Pisgah Forest, North Carolina. The contractor shall specify in the offer where the work under this contract will be performed, indicating the location of the project manager for the duration of the project.

SECTION H-CONTRACT AWARD

The CFA Interpretive Association will award a contract resulting from this solicitation to the responsible offeror whose offer conforming to the solicitation will be most advantageous to the Forest Service and the Interpretive Association, cost or price and other factors, specified elsewhere in this solicitation, considered.

The CFA Interpretive Association may (1) reject any or all offers if such action is in their interest, (2) accept other than the lowest offer, and (3) waive informalities and minor irregularities in offers received.

The CFA Interpretive Association may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the offeror's best terms from a cost or price and technical standpoint.

The CFA Interpretive Association may, after evaluation of all offers, request those deemed to be best qualified to participate in an interview as part of the final selection process.

SECTION I-INSTRUCTIONS FOR TECHNICAL AND COST/PRICING PROPOSALS

1. General Instructions

The following instructions establish the acceptable minimum requirements for the format and content of proposals:

(a) The proposal must be prepared in two parts: a technical proposal and a cost/pricing proposal. Each of the two parts shall be separate and complete in itself so that evaluation of one may be accomplished independently from evaluation of the other. The technical proposal must not contain reference to cost; however, resource information (such as data concerning labor hours and categories, material, subcontractors, etc.) must be contained in the technical proposal so that the contractor's understanding of the Statement of Work may be evaluated. It must disclose the contractor's technical approach in sufficient detail to provide a clear and concise presentation that includes, but is not limited to, the requirements of the technical proposal instructions.

(b) Offerors may, at their discretion, submit alternate proposals or proposals which deviate from the requirements set forth in the Statement of Work. Any "alternate" proposal may be considered if overall performance would be improved and not compromised, and if it is in the best interest of the CFA Interpretive Association and the USDA Forest Service. Alternate proposals, or deviations from any requirements of this RFP, must be clearly identified.

(c) The USDA Forest Service and CFA Interpretive Association will evaluate proposals in accordance with the evaluation criteria set forth in Section J of this RFP.

2. Technical Proposal Instructions

(a) Proposals which merely offer to conduct a program in accordance with the requirements of the Statement of Work will not be eligible for award. The offerer must submit an explanation of it's proposed technical approach in conjunction with the tasks to be performed in achieving the project objectives.

(b) A detailed work plan must be submitted indicating how each aspect of the Statement of Work is to be accomplished. The technical approach should be in as much detail as the offeror considers necessary to fully explain the proposed technical approach or method. The technical proposal should reflect a clear understanding of the nature of the work being undertaken.

(c) The technical proposal must include information on how the project is to be organized, staffed, and managed. Information should be provided which will demonstrate the offeror's understanding and management of important events or tasks. The offeror must explain how the management and coordination of consultant and/or subcontractors efforts, if used, will be accomplished.

(d) The technical proposal must include a list of names and proposed duties of the professional personnel, consultants, and key subcontractor employees assigned to the project. Their resumes should be included and should contain information on education, background, recent work experience, and specific related accomplishments. The approximate percentage of time each individual will be assigned for this project must be included. The proposed staff hours for each of the above individuals should be allocated against each task or subtask for the project.

(e) The technical proposal must provide the general background, experience, and qualifications of the organization. Similar or related contracts and subcontracts should be included and each contain the name of the customer, dollar amount, time of performance, and names and telephone numbers of the project officer.

(f) The technical proposal must contain a discussion of present or proposed facilities and equipment which will be used in the performance of the contract.

(g) The technical proposal must include a time line showing the length of time for the contract with quantifiable goals and planned accomplishments identified at appropriate locations.

3. Cost/Pricing Proposal Instructions

(a) The offeror shall submit a price for providing the services outlined in the Statement of Work. The price shall include a detailed breakdown to support the proposal and shall include:

(1) Breakdown of labor cost by named person including number of labor hours and average hourly rates.

(2) The amount proposed for travel, subsistance, and transportation.

(3) Cost breakdown of materials, equipment, and other direct costs including duplication/reproductions, meetings and conferences, postage, communication, and any other applicable items.

(4) If consultants are proposed, detailed data concerning proposed consultant costs should include the following:

(i) Names of consultant(s) to be engaged.

(ii) Daily fees to be paid each consultant.

(iii) Estimated number of days of consultant services.

(5) If proposed, cost information for each subcontractor shall be furnished in the same format and level of detail as prescribed for the prime offeror. Additionally, the offeror shall submit the following information:

(i) A description of the items to be furnished by the subcontractor.

(ii) Identification of the proposed subcontractor and an explanation of why and how the proposed subcontractor was selected.

(iii) The proposed subcontract price.

(iv) Identification of the type of subcontract to be used.

(6) An estimated cash flow. Each offeror is required to submit a schedule of proposed monthly costs for the planned duration of the project.

(7) A detailed Capital Campaign Budget estimate, including such items which will be financed by the CFA Interpretive Association such as printing fund raising brochures, direct mail pieces, pledge cards, stationery, and envelopes, and press kits, audiovisual productions, etc.

SECTION J-EVALUATION FACTORS FOR AWARD

1. Evaluation of proposals

Proposals will be evaluated and ranked by a Selection Panel made up of representatives from the CFA Interpretive Association and the USDA Forest Service. The following criteria will be considered in evaluating proposals:

(a) Technical Approach: A demonstrated, comprehensive understanding of the basic objectives of this scope of work and the presentation of a concise, sound, cost-effective approach to achieve these objectives, including realistic timetable for scheduling the Capital Campaign.

(b) Personnel: Experience of the assigned staff in planning and managing capital campaigns; particularly for projects of similar subject and scope. Related experience in managing nationwide capital campaigns.

(c) Firm's Experience and Organization: Evidence of the firm's ability and experience (particularly recent) to planning and managing capital campaigns of similar subject and scope. Related experience in managing nationwide capital campaigns. The expertise and resources that the offeror agrees to commit to this project.

(d) Cost for providing the work specified in the Statement of Work.

SECTION K-SUBMISSION OF PROPOSALS

All proposals shall be submitted as follows:

1. Technical Proposals- 5 copies.

2. Cost/Pricing Proposal- 5 copies.

SECTION L-STATEMENT OF WORK

CRADLE OF FORESTRY CAPITAL CAMPAIGN

1. Scope of Contract:

The contractor shall furnish the necessary personnel, materials, services, equipment, facilities, and otherwise perform all work necessary for and incidental to the performance of the work set forth in this Statement of Work.

2. General Description of Services:

The basic intent of this contract is to assist the Cradle of Forestry in America Interpretive Assocation and the USDA Forest Service in planning for a Capital Campaign of approximately $2,600,000 and providing public relations and Capital Campaign management for the duration of the fund drive. It is estimated that the planning period for the Campaign will be approximately six (6) months and the actual Campaign will last twelve (12) months.

3. Background Information:

(a) History: The Cradle of Forestry in America is a 6,540 acre National Historic Site commemorating the birthplace of scientific forestry and forestry education in America. The Cradle of Forestry received national recognition on June 25, 1988 with the opening of a new 7,775 square foot Visitor Orientation Center. Refer to the Cradle of Forestry in America Management Plan (Attachment B) for a detailed description of existing and planned facilities.

(b) History of Funding: Funding for the development and maintenance of the existing facilities at the Cradle of Forestry has come from a diversity of sources. These include appropriated funds, Job Corps vocational skills training program, the Cradle of Forestry in America Interpretive Association, and donations from private citizens. In response to the opening of the new Visitor Orientation Center at the Cradle of Forestry and awareness of an upcoming Capital Campaign, a donor has pledged $100,000 for the continued development and improvement of Cradle of Forestry facilities and improvements.

(c) Capital Campaign Feasibility Study: On January 4, 1988 the USDA Forest Service contracted with David Winslow & Associates to conduct a study (Attachment A) to determine the feasibility for success of a Capital Campaign to raise approximately $7 million for the continued improvement and development of the Cradle of Forestry in America. The Feasibility Study, completed May 24, 1988 recommended that the planned development for the Cradle of Forestry be separated into phases. The study further recommended that the Cradle of Forestry Interpretive Association and the USDA Forest Service embark on a Capital Campaign with a goal of approximately $2 million for Phase 1 development.

(d) Funding Needs: The Cradle of Forestry in America Management Plan outlines the planned facilities for the Cradle, estimated to cost $7+ million. An immediate need of $160,000 for fabricating and installing interpretive and educational exhibits in the new Visitor Orientation Center has been identified. In addition, the estimated cost for Phase 1 of the expanded Cradle development is $2,475,000. See Attachment C for a cost estimate of planned facilities.

(e) Capital Campaign Stategy: The Capital Campaign for the Cradle of Forestry will be cooperatively managed by the Cradle of Forestry Interpretive Association and the USDA Forest Service. The CFA Interpretive Association will contract for consultant services to assist with planning and managing the Campaign. The Forest Service will provide the administration and supervision for the contract, as well as staff support to manage the Campaign with assistance from the consultant.

The following individuals have indicated their willingness to serve as honorary co-chairmen for the Cradle of Forestry Capital Campaign:

Honorable James McClure Clarke, U.S. Congressman for North Carolina

William (Bill) Towell, former Executive Director of the American Forestry Association and former President of the Society of American Foresters.

The Campaign will be overseen by a volunteer Planning and Steering Committee of ten to fifteen individuals, headed by a Campaign Chairperson or Co-Chairpersons. Committee members will be representatives from the USDA Forest Service, CFA Interpretive Association Board of Directors, and key industry, conservation, professional, and educational leaders.

The function of the Planning and Steering Committee(s) will be to re-examine the goals and objectives for expanded development of the Cradle of Forestry, define Phase 1 for the initial Campaign emphasis, and guide the Capital Campaign process.

4. Detailed Description of Work

The contractor shall perform the following services:

(a) Campaign Planning

(1) Advise the USDA Forest Service and the CFA Interpretive Association on the tasks of the Planning Committee and the identification and selection of participants.

(2) Develop work plans for the Planning Committee and provide guidance to the Committee, including development of a Campaign plan and timetable.

(3) Prepare a case statement for use as a tool in securing leadership and financial support for the Campaign. The case statement will include:

(i) Articulation of the Cradle of Forestry Interpretive Association's purpose and mission;

(ii) Articulation of the Cradle of Forestry's value and purpose;

(iii) A clear statement of the need for this fund raising program;

(iv) A compelling message of opportunity, urging prospective donors and volunteers to support the Campaign.

(b) Campaign Public Relations

(1) Develop a press kit for production by the CFA Interpretive Association containing information on the Cradle of Forestry and the Campaign for distribution to news media.

(2) Establish media contacts and distribute the press kit to promote an awareness of the Cradle of Forestry and the upcoming Campaign. Maintain media contacts throughout the Campaign to assure public awareness of the Campaign progress.

(3) Develop a public awareness program for the Campaign, including audiovisual presentations, brochures, and a public relations activities plan with special events to increase public participation in the Campaign.

(c) Campaign Management

Work with the Campaign Steering Committee to design the Campaign for the Cradle of Forestry, as well as work with the Steering Committee and applicable subcommittees to implement the Campaign. The contractor will be responsible for the following tasks:

(1) Advise the USDA Forest Service and the CFA Interpretive Association on the selection of members for the Campaign Steering Committee.

(2) Prepare work plans for the Steering Committee and applicable subcommittees.

(3) Assist the Steering Committee with recruiting leadership for volunteer solicitation subcommittees.

(4) Assist the Steering Committee with recruiting leadership for volunteer non-soliciting support subcommittee(s) to coordinate activities such as Campaign kick-off ceremonies, celebration ceremonies, special events, etc.

(5) Compile and analyze data on potential donors. Expand the list of prospective donors identified in the Capital Campaign Feasibility Study (Attachment A). Research and evaluate prospective individual, foundation, corporate, and government donors as to possible gift amounts for solicitation and proposed submission.

(6) Advise the Steering Committee and applicable subcommittees on strategies for personal solicitations of donor prospects and applicable volunteer telemarketing solicitations.

(7) Assist the Steering Committee in solicitation of major donor prospects, including writing tailored proposals for submission.

(8) Advise the Steering Committee on strategies for seeking Congressional and Federal Government appropriations for the Campaign.

(9) Train volunteer solicitors, including development of appropriate support materials.

(10) Develop fund raising material for use in the Campaign, including direct mail piece for solicitations, pledge cards, stationery, etc.

(11) Plan and manage cultivation events to solicit Campaign leadership and financial support.

(12) Plan and oversee direct mail solicitations.

(13) Assist the Forest Service in developing computer systems (hardware and software) to meet Campaign needs, such as a record of potential donors, maintaining records of solicitations and donations, and automated billing to donors.

(d) Campaign Grantsmanship

The contractor shall be responsible for seeking funds from corporate and foundation sources. The contractor will be responsible for the following tasks:

(1) Research potential corporate and foundation sources.

(2) Represent the CFA Interpretive Association on preliminary grant request discussions with foundation and corporate personnel, as requested.

(3) Advise the Steering Committee on strategies for encouraging the support of potential corporate and foundation donors.

(4) Write proposals.

(5) Monitor the progress of proposals after submission.

(6) Advise the CFA Interpretive Association on the requirements of grants awarded, including payment requests, reports, and audits.

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CRADLE OF FORESTRY IN AMERICA INTERPRETIVE ASSOCIATION AND THE USDA FOREST SERVICE

FEASIBILITY STUDY FINAL REPORT

Prepared and Submitted by:

DAVID WINSLOW AND ASSOCIATES, INC.

May 24, 1988

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CRADLE OF FORESTRY IN AMERICA INTERPRETIVE ASSOCIATION
FEASIBILITY STUDY FINAL REPORT

I. RECOMMENDATIONS

A. The Cradle of Forestry in America Interpretive Association (CFAIA) and the United States Forest Service (USFS) should embark upon a campaign with a goal of approximately $2 million, with $1 million to be sought in federal appropriations as a challenge grant and $1 million to be sought from the private sector.

B. The CFAIA and the USFS should immediately undertake an intensive period of campaign preparation.

The goals of this process should be:

(1) to critically reassess the project in light of the results of the feasibility study;

(2) to redesign and better define the project, and to divide the total project into phases, with the first phase totaling approximately $2 million; and

(3) to involve potential supporters of the project in the process.

C. A public relations program should be initiated to increase public awareness of the site and the project.

D. The CFAIA and the USFS should secure a staff coordinator for the campaign.

E. Fund raising counsel should be retained for the planning process and for the campaign.

II. EXECUTIVE SUMMARY

A. Introduction

On December 6, 1891, the forestry profession was born in America. It was on that date almost one hundred years ago that Gifford Pinchot was engaged by George W. Vanderbilt and Frederick Law Olmstead as the forester for the Biltmore Estate. It was at this site that Pinchot was able to prove that, practiced responsibly, modern forestry methods were economically and environmentally advantageous to industry, government and the people. It was here that the seeds were sown for the creation of the United States Forest Service, the first forestry school in America and the long-term development of one America's major industries.

In 1968, the United States Congress designated 6,450 acres of the 100,000-acre Pisgah National Forest as the "Cradle of Forestry in America." Subsequently, a visitor's center was constructed, and visitation to the area climbed substantially. In 1984, the Visitor's Center was destroyed by fire. With the loss of the Center, visitation dropped dramatically.

With the centennial of Pinchot's arrival at Biltmore approaching, the Board of Directors of the CFAIA and the leaders of the USFS face both a challenge and an opportunity. If the significance of the site is to be finally established in the minds of the forestry profession, industry, government and the people, bold steps must be taken now. If education of the people and the proper interpretation of the site is to be accomplished, old relationships must be reinforced and new partnerships must be forged.

Comprehensive study of the potential for development of the Cradle of Forestry site demonstrates that now is the time to act. Now is the time for affirmation of the commitment of the CFAIA to its goals and objectives. Now is the time for the USFS to make its commitment of time, money and resources. And now is the time to begin developing the private sector's role in seeing that the Cradle of Forestry realizes its place in history and in the future.

B. Recommendations

Having conferred with almost seventy forestry and business professionals, government leaders, private citizens and the leadership of the USFS, David Winslow and Associates, Inc. is confident in recommending that the leadership of the CFAIA, the USFS and selected public and private individuals immediately commence the final planning process for the development of the

site and for the procurement of the funds for the first phase of development.

We urge the creation of a special planning committee, composed of USFS personnel, members of the Board of Directors of the CFAIA, and key industry, conservation, and professional leaders, to carefully re-examine the development plans for the Cradle of Forestry. We further recommend that this re-examination of the goals and objectives for future development of the Cradle site be coordinated by outside management and fund raising professionals.

While we do not believe it is feasible to raise the total amount of funds necessary to develop the site on the scale originally proposed (see Case Statement, Appendix K), we believe that the site can and must be developed in phases. We believe that approximately $2 million can be secured from a variety of public and private sources over the next nineteen months and that this figure should be used in planning for the development of Phase I of the effort. The success of Phase I should be used as the basis for future phases of development.

We recommend that efforts begin immediately to secure the necessary startup funds for the campaign from the USFS. Without the quiet and solid leadership of the USFS, the chances that this effort can begin in time to celebrate the centennial are remote.

Increasing public awareness of the significance of the Cradle of Forestry must be a goal of the overall campaign effort. Steps should be taken now and in the course of the campaign to raise the level of public awareness of the Cradle of Forestry.

The USFS, the CFAIA, and interested business, education, and environmental interests cannot and will not separately or by themselves develop the site in a timely manner. A new partnership must be forged if this project is to succeed. Money itself is less problematic than developing the dialogue and clear understandings on the part of all the parties needed to complete the project.

C. Conclusion

The next two years promise to be important and exciting ones for the Cradle of Forestry. Completed in time for the centennial of forestry in America, the CFAIA and the USFS will develop the first and most important phase of a plan which celebrates the first one hundred years of forestry in America and sets the stage for the second century of development.

III. DESCRIPTION OF PROCESS

The first step in the feasibility study was the development of a "case statement." This document describes the project to individuals who may not be aware of it, and explains the rationale for supporting the project. DWA wrote the case statement for the Cradle of Forestry based upon the management plan developed by the USFS. Several discussions were held with USFS personnel and CFAIA Board members to clarify points during the development of the case statement. The final version (Appendix K) was reviewed and approved by Don Fisher of the USFS and Fran Waser, Chairman of the CFAIA.

Interviews were then conducted with all the members of the Board of Directors of the CFAIA, as well as all honorary Board members. Board members were asked about their involvement with the CFAIA and their perceptions of the project and the fund raising campaign, and were asked for suggestions of potential sources of funds and leadership prospects.

While this process was underway, DWA was compiling a list of interviewees. We sought to interview a broad cross-section of current and potential supporters of the project. The final list was the result of the preliminary interviews with Board members, discussions with USFS personnel, and research by DWA. The list spanned industry, forestry and conservation organizations, forestry schools, the USFS, Congress, State government, and interested individuals (Appendix C).

A letter of introduction (Appendix A) to the interviewees was drafted by DWA and approved by Don Fisher and Fran Waser. The letters were signed by Congressman Jamie Clarke, Forest Supervisor Bjorn Dahl, and Bill Towell, the former Executive Director of the American Forestry Association and former President of the Society of American Foresters. The letters were sent to all interviewees with a copy of the case statement.

DWA followed up the letters with telephone calls to the individuals on the list requesting interviews. Although this process was very time consuming, DWA was successful in contacting and securing appointments with almost all of the individuals on the list.

Interviews were conducted in person or by telephone by Maggie Mead or David Winslow. Of the total interview list of 76 individuals, 67 were interviewed (61 in person and 6 by telephone); 6 were not successfully contacted or were not available for an interview during the time period of the feasibility study; and 3 refused interviews.

Ordinarily a feasibility study consists of 35 to 40 interviews. Because of the complexity of this project, the numerous potential constituencies, and the lack of information about past and potential supporters of the CFAIA, DWA felt it necessary to interview more individuals than is standard practice.

The interview questionnaire (Appendix B) was designed to gauge the interviewees' perceptions of the Cradle of Forestry and its plans for the future. The questionnaire addressed three major issues: (1) the public image of the Cradle; (2) the campaign itself (the goal, support for the Cradle of Forestry project as expressed in the Case Statement, the timing of the campaign, and possible sources of funds); and (3) leadership prospects.

The questions were designed to be qualitative rather than quantitative and were somewhat open-ended to encourage the interviewees to express their opinions freely and in detail. The results of the questionnaire were compiled by DWA staff and are presented in Section IV, Interpretation of Data.

IV. INTERPRETATION OF DATA

Image

The first segment of the questionnaire established the context for questions asked later during the interview. Board members were asked a few questions pertinent to their involvement; non-Board members were asked more general questions in order to determine their basic background with the project.

1.a. (Board) How did you become involved with the Cradle of Forestry?

The answers reveal an interesting combination of Board members, some of whom have only been involved a very short time, and some who have family ties to the site which go back several generations. Dr. Jolley is a common link to many of the Board members and the reason for their involvement.

1.b. (Other) How familiar are you with the Cradle of Forestry?

ORGANIZATIONS: There is generally very strong awareness of the Cradle on the part of forestry organizations and associations.

EDUCATIONAL INSTITUTIONS: There is significantly less familiarity with the Cradle of Forestry with the educational leaders interviewed. North Carolina-based forestry schools generally regularly send their students to the site on field trips.

GOVERNMENT REPRESENTATIVES: Individuals within the USFS are very familiar with the CFA. With certain exceptions, other Federal and State government leaders are not very familiar with the site.

POTENTIAL DONORS: Prospective donors were split 50/50 on this question. The answers ran the range from "not familiar at all" to "very familiar."

2. Have you ever visited the Cradle of Forestry?

ORGANIZATIONS: About half of the organizational representatives had indicated they had visited the site.

EDUCATIONAL INSTITUTIONS: While many of the educators said that their students had made field trips to the site, a majority of them had not visited the site.

GOVERNMENT: All of the USFS representatives interviewed had visited the site. Most of the other government representatives interviewed had never been there.

POTENTIAL DONORS: Of those who expressed previous knowledge of the site, more than half had visited the site.

3.a. (Board) What do you think draws visitors to the Cradle of Forestry?

"Proximity to other tourist sites"; "It's a secondary benefit to other tourist efforts." Although some "forestry folk" make a pilgrimage to the site, other visitation is incidental in the opinion of most of the Board. Often cited by Board members as the chief draw of the Cradle of Forestry is the natural beauty of the area.

3.b. (Others) What drew you to visit the Cradle of Forestry?

ORGANIZATIONS: Five of the 8 answers were "not applicable". Two of the three remaining individuals cited camping as the reason they were in the area; one individual said he served on the first advisory committee.

EDUCATIONAL INSTITUTIONS: Interest in forestry was the sole answer.

POTENTIAL DONORS: (1) Other area attractions; (2) work; or (3) family ties to the area were the most cited answers.

4. What, in your opinion, are the most important public services or benefits that the Cradle of Forestry provides?

BOARD: "Education and history" were the two key words which emerged from this question. Said one, "It's the best propaganda tool the USFS has." "It's more or less a national shrine for the forestry profession." Many said that the Cradle of Forestry needs to offer more attractions and activities.

ORGANIZATIONS: Many diverse answers were received, including: "It's a means for educating woodland owners." The Cradle of Forestry helps explain the difference between a national park and a national forest. [redacted] of the public has little knowledge of forestry or the concept of multiple use. The Cradle of Forestry explains the mission of the USFS.

EDUCATIONAL INSTITUTIONS: "Awareness of forestry and forest industry and its importance to the economy. Industry needs and wants to get the message across. Forestry is a major industry of the South and must be supported."

GOVERNMENT: "Like Kill Devil Hills, it's a real North Carolina asset." "Most yuppies equate multiple use with destruction" -- this site, the oldest where forestry in America was practiced, tells a more complete story"; "Forests are dynamic and resilient"; "Every natural resource person should know about it".

POTENTIAL DONORS: "Platform for educating the public on proper forest management, good stewardship and multiple use."

5. How well known do think the Cradle of Forestry is?

BOARD: Most Board members agree that the Cradle of Forestry is known by area people and the forestry profession. The average citizen doesn't know about it.

ORGANIZATIONS: "Nil." "It's lost in all the other attractions in the area". Unknown to the general public.

POTENTIAL DONORS: "Site is logical for tourists." But, "not well known outside of the forestry profession."

"The name is a drawback."

6. How could the Cradle of Forestry better market its attractions?

BOARD: Most responded by saying: (1) better networking with pre-existing state travel organizations and local interests; (2) better signage; (3) placements in national/regional magazines; (4) more materials at visitor centers.

Some felt it more appropriate for the "private" side of the public/private partnership to take on marketing the site. Some expressed unhappiness with the fee system. Many said that more attractions, more selections in gift shop, etc. were necessary before more marketing would be successful.

ORGANIZATIONS: "It takes constant attention . . . periodic work with the media locally and in the contiguous states."

EDUCATIONAL INSTITUTIONS: No answer.

GOVERNMENT: "It hasn't been marketed because there is not enough to show!" "Must be marketed with discretion." "Change logo to stress American Forestry."

POTENTIAL DONORS: "Ought to tie in with industry today." Market through "Blue Ridge Parkway and Smoky Mountain National Park."

Campaign

7. Do you think that the federal government, national foundations, and corporations will support a capital campaign for the Cradle of Forestry? Why or why not?

BOARD: The response to this question was very mixed. Many felt the project should be scaled down. Many felt that if the project were properly presented the wood products industry would be responsive.

ORGANIZATIONS: "Matching funds concept is a good one." "It needs the influence of a 'sugar daddy'." AFA and SAF have had difficult time getting corporate support. "Easy sell, even in these difficult times, to Congress."

EDUCATIONAL INSTITUTIONS: "There will be support, but to what degree?" "Yes, the key is the CEOs."

GOVERNMENT: "Yes. the USFS will." Beyond the USFS's involvement, government leaders weren't sure of support. Corporate CEOs were thought to be the key.

POTENTIAL DONORS: "The USFS should be a major contributor." "Yes, if the campaign is based upon common sense." Generally, the feeling was that industry support is possible if the right people are involved and if the federal commitment is clear.

8. Do you believe that $6-7 million is attainable from government and private sources for the projects on the Needs List?

A majority of the interviewees felt that project should be scaled back -- the total sum is not attainable. A minority indicated that $6-7 million is feasible if the campaign is phased over a period of time and has healthy government participation.

9. Can you suggest any individuals, corporations, or foundations that might be major donors to this campaign?

See Appendix H.

10. Would your company/foundation contribute to this campaign?

BOARD: Where applicable, the answer was yes.

ORGANIZATION/EDUCATIONAL INSTITUTIONS/GOVERNMENT: Not applicable.

GOVERNMENT: Several individuals mentioned a strong probability of funding on a matching basis from the federal government.

POTENTIAL DONORS: There were few absolute "no's"; many could not answer with any certainty. Many said "Yes, but not at the level needed to complete a $6-7 million effort."

11. Which of the proposed needs would your company/foundation be most interested in supporting?

Generally, the Tram was seen as an unnecessary component of the project. Many felt the food service center should be self-supporting or possibly built and managed by a concessioner. The Resource Management Center was more positively perceived, as was the Forest History Center.

Many interviewees had a difficult time understanding the differences between one project objective and another -- some suggesting that some of the buildings/centers could be combined at a dramatic cost savings. In general, the perception was that there was a lot of "fat" in the project.

12. Would you personally give to the campaign?

BOARD: While most were positive about giving to the project and demonstrated a level of commitment, the interviewers perceived that the Board was little more knowledgeable about the objectives of the campaign than many outsiders. Loyalty, history and geography tended to guide the Board's positive feelings. Negative aspects included being somewhat overwhelmed by the goal and a feeling that the CFAIA is not organizationally capable of undertaking a major fund raising campaign.

ORGANIZATIONS: Most were not asked this question since they were being queried for other reasons. The one time it was deemed appropriate to ask it, the response was "Yes, a moderate contribution."

EDUCATIONAL: N/A

GOVERNMENT: N/A

POTENTIAL DONORS: When it was appropriate to ask this question, we received some positive responses.

13. Considering economic and other factors, is this a good time to launch a major fund raising campaign?

In short, the Board was much more pessimistic than industry, organizations or the educational representatives. The wood products industry is currently having its best year in the past eight or nine years. The sooner industry is approached, the better the chances are for receiving contributions.

Interestingly, DWA noted much greater concern about the prospects about the economy <u>after</u> the election -- much more than was expressed after the stock market crash in October, 1987.

14. Are you aware of any other fund raising campaigns that will take place in the next two years and which would be in direct competition with this one?

There are no campaigns planned that are exactly like this one. However, the general perception was that there is a lot of competition for limited funds. The World Forestry Center in Oregon is supported by the major Western US forest products corporations. The Arboretum was also mentioned. The various forestry schools regularly solicit the same potential donors to which the Cradle of Forestry would appeal.

15. What do you think would be the major difficulties to be overcome in mounting a capital campaign for the Cradle of Forestry?

BOARD: "Structure is not here on the Board to carry out a campaign." Several Board members mentioned the competition for support with some Asheville organizations. Securing the proper leadership was also mentioned as a hurdle to be overcome. The strong USFS role was perceived both positively and negatively.

ORGANIZATIONS: "It's not national -- it's perceived as a tourist stop in Western North Carolina."

More importantly, organizations experienced in fund raising raised two important concerns: (1) the "bottom-line" effect would have to be made more apparent before industry will participate; and (2) the "message" of the project (interpretation of the sites and exhibits) would have to be balanced.

EDUCATIONAL INSTITUTIONS: "Why doesn't the USFS just do it?"

GOVERNMENT: Lack of awareness, the "so what" factor, and "people don't understand it" were cited as problems to be overcome.

POTENTIAL DONORS: Convincing donors that the value is greater than the cost was seen as something to be overcome. Making the project "national" was mentioned as another hurdle.

16. Do you have any suggestions for how these difficulties might be overcome?

BOARD: "Good leadership to stir things up", and "a statement of support from the leadership of the Department of Agriculture and the USFS."

EDUCATIONAL INSTITUTIONS: "Emphasize program for which there's an audience."

GOVERNMENT: Public relations. "Needs to be made an attraction -- a destination."

POTENTIAL DONORS: Leadership. Get the attention of the American Paper Institute. Change name to something that men will want to ask for -- as opposed to "Will you give to my cradle?"

The benefits of giving must be demonstrated -- public relations and "bottom-line" when possible.

17. What factors might be particularly helpful to such a campaign?

BOARD: "Uniqueness of the place and the story it has to tell." It's the birthplace of "Forestry and Conservation" in America. The historical significance of the site was often mentioned. Forestry is "part of our heritage."

"There are some people on the Board with some interesting (powerful) connections."

ORGANIZATIONS: Educational concept; history and management.

GOVERNMENT AND EDUCATIONAL INSTITUTIONS: Not applicable or no answer.

POTENTIAL DONORS: Could get a lot of press -- Nature Conservancy, Audubon Society, Trout Unlimited. "Industry has problem with public stewardship of their lands -- educating the public is important."

"The fact that it is in a well known National Forest."

Leadership

18. Who would be a good chairman for the campaign?

See Appendix F.

19. Can you suggest other leaders and workers for the campaign?

See Appendix F.

20. Would you be willing to serve in key position?

BOARD (AND HONORARY): Sixteen did not respond. Of the remaining, we got one solid yes, three no's, and three "it depends".

ORGANIZATIONS: One yes; six did not respond; one "would lend my name, but am over-extended."

EDUCATIONAL INSTITUTIONS: Four did not respond; one replied, "I'm gone a lot and am not reliable."

V. CONCLUSIONS

A. Strengths and Weaknesses

The Cradle of Forestry project is basically worthwhile and fundable, and the project has some very strong assets. However, the project as presently conceptualized has some major problems that stand in the way of its success. DWA proposes a plan for overcoming these problems by capitalizing upon the project's strengths in order to reach the ultimate goal: raising funds to enable the establishment of the Cradle of Forestry as a major center for forestry interpretation and education in America.

The primary strengths of the Cradle of Forestry project are:

(1) A historically significant site: The Cradle of Forestry is nationally significant as the birthplace of modern forest management in America, and as the site of the first forestry school in the nation. The site is well known and held in high esteem in the forestry world. The 100th anniversary of the beginning of Pinchot's activities at Pisgah Forest will be in 1991.

(2) A very large potential market: The Cradle's location in a heavily visited area is a definite asset. It is also accessible to a very large portion of the population in the eastern United States.

(3) A governmental source of funds: The Federal government is capable of making the "lead gift" to the project.

(4) Strong support within the U.S. Forest Service: This project is a priority to the USFS leadership in the Southeast and nationally.

(5) Congressional support: Strong support from the 11th District Congressman is almost a certainty, and Senators Helms and Sanford are willing to follow this lead.

(6) Some very dedicated supporters: The CFAIA, past and present USFS employees, and other individuals have provided strong leadership over the years in establishing and promoting the CFAIA.

(7) Technical expertise: The USFS can provide much of the technical assistance necessary to execute the project.

(8) Ties with forestry and industry associations and educational institutions: We have commitments of assistance from many of these organizations.

(9) Strong ties with the local community: The CFAIA Board is very well connected in the western North Carolina region.

(10) Some interest from potential major donors: A few potentially large donors are enthusiastic about the project.

(11) Increasing awareness about the project: Individuals who "should" know about the project are becoming informed, partly as a by-product of the feasibility study.

(12) A good economic situation: The paper and pulp industry has had two very good years, and the prognosis is good for the immediate future.

In spite of the considerable strengths of the Cradle of Forestry, the project is lacking some elements critical to successful fund raising:

(1) Recognition of the site by the general public: The Cradle suffers from low visibility and low public awareness.

(2) Well defined and defendable objectives and methods: Most individuals interviewed agreed that the public is largely unaware of the practices and benefits of modern forestry. This was perceived to be a major problem that is steadily becoming worse. Educating the public about forestry is considered to be an important goal. However, there are many questions about how this is going to be accomplished at the Cradle of Forestry and whether this project is the best and most effective way to achieve this goal.

(3) Identification with the project beyond the USFS and CFAIA: The USFS is perceived to "own" the project. The USFS is also perceived to "own" the CFAIA. We often heard, "Why doesn't the government do it all? Why should we give to their project?."

(4) Involvement of key potential supporters: It actually is the USFS's project. The project was developed in a vacuum and then transferred to an organization that is in effect a USFS subsidiary. No potential supporters have been included in or informed about the development of the project.

(5) Answers to the financial questions: We do not yet have hard, detailed estimates of design and construction costs, and no explanation of the sources and uses of

startup and operating funds. The lack of operational support for the Cradle at present does not send a very encouraging message to the public.

(6) No existing pool of highly placed leadership prospects: The CFAIA Board is lacking in individuals who are on a peer level with the individuals who could solicit major gifts from potential donors.

(7) No commitment of lead gifts from the public or private sectors: Federal appropriations are never certain until received, and the USFS has yet to express its support for the project in terms of hard cash. Private donors are also noncommittal, in part because they are waiting to see what the government will do.

(8) No staff to coordinate a campaign: USFS and CFAIA staff are already overtaxed, and current appropriations are too low to support additional staff.

(9) No fund raising expertise: Neither the USFS nor the CFAIA has ever undertaken a fund raising campaign of this magnitude before.

These problems, although major, can be overcome with some hard work, and we believe that a fund raising campaign can be successful if these weaknesses are remedied. The following plan details the project as we see it.

B. The Campaign

1. The Goal

DWA found very little evidence that $6-7 million can be raised in the foreseeable future for the project as it is presently conceived. It is possible that this amount can be raised over a protracted period of time for the project. DWA does believe, however, that a goal of $2 million over a three-year period is reasonable and attainable at the present time if the project is phased and very thoroughly planned.

This campaign will be successful only if it is structured as a true public/private partnership. A challenge grant from the Federal government for $1 million should form the base of the campaign, with the remaining $1 million raised from the private sector. A major show of commitment from the Federal government at the outset of the campaign is crucial to leverage the maximum investment from the private sector.

2. Planning

The most consistent criticism of the project that we received was that there were still too many unanswered questions. People did not understand the functions of the different components of the project, and many believed that the estimates were soft. The project was also thought to be too ambitious; many respondents suspected "government waste" and possible overlap with other facilities and services.

DWA proposes that the USFS and the CFAIA embark upon an intensive period of planning. The following tasks must be accomplished before the project will "sell" in the donor marketplace:

(a) **Set priorities among the different components of the project, and divide the project into three approximately equal phases.** Only the first phase should be attempted now. The project should be allowed to build gradually, with each successive phase based upon the success of the prior phase.

(b) **Define each element of the project precisely.** Trim off any redundancy within the project and overlap with other facilities.

(c) Assemble data on the potential audiences for the project and their expected utilization of the facilities.

(d) **Develop further the information to be presented at** the Cradle **and the means of presentation.**

(e) **Develop detailed estimates of costs of design and construction for the first phase.**

(f) **Develop an operating** budget, outlining the sources and uses of funds.

This planning process should be used as an opportunity to involve other parties in the projects, as part of the cultivation process for potential supporters and key individuals. **A planning Committee of approximately ten individuals should be assembled to perform the planning work. This group should include representatives of the USFS and the CFAIA, educators, industry representatives, and a conservationist.**

3. Public Relations

A concentrated effort must be made to heighten the visibility of the CFA. A public relations program including printed and audio-visual materials, presentations to organizations, articles for publication, press releases, etc. should be developed and implemented prior to the campaign kick-off. The historical significance of the site and its association with colorful individuals such as Pinchot, Schenck and Vanderbilt should be emphasized to capture people's imaginations and stimulate interest in the project.

4. Appropriations

While the planning process is underway, the USFS should act immediately to secure appropriations for a challenge grant in the 1989 budget. Support for this proposal must come from the Forest Supervisor's office, with the full support of the Regional Forester and the Chief. With support of the USFS secured, Congressman Jamie Clarke's assistance should be enlisted to insure Congressional support for the proposal.

5. Private Sector Fund Raising

Private fund raising will begin after federal challenge funds have been committed. The campaign will be national in scope, with efforts concentrated in North Carolina, Washington DC, and the eastern United States.

Major Corporate Gifts ($500,000): In order to carry off a campaign of this size, several lead gifts in the $100,000 to $250,000 range must be secured (see Appendix G). The most probable source of these major gifts is the forest products industry. However, interest in the project in the industry varies widely. Some individuals are very interested and anticipate that their companies would make major gifts; others are nearly indifferent, both to the project and to the suggestion that their competitors may be investing at a high level.

Since we do not already have supporters at high levels within these organizations, we will have to do a considerable amount of cultivation. We do have contacts and friends at the local level in some of the major corporations. We have also made contact with a couple of key, high-level individuals who may be supporters of the project. DWA proposes to use these contacts to cultivate the decision makers in the industry.

One of the best methods for cultivating these prospects is through the **American Paper** Institute. The Board of this organization is composed of the CEOs of the major paper and pulp producers. If we can "convert" a member of the Board of the Institute, then that person can serve as an advocate of the project to the other Board members.

Smaller Industry Gifts and Individual Gifts ($200,000): We can also utilize industry and professional associations to cultivate and solicit smaller industries and individuals. The North Carolina Forestry Association, the Southern Appalachian Multiple Use Council, the Society of American Foresters and other organizations can bring the campaign before their members in a favorable light and assist us in our solicitation efforts.

Local Campaign ($100,000): We envision a campaign on the local level (Brevard, Hendersonville and Asheville) to take advantage of the high visibility of the CFA in that region and tie into existing tourism and related activities. This is an area in which the CFAIA can be extremely useful.

Foundations ($200,000): The project was favorably received by the Kresge Foundation, and there is a possibility of grants from other major foundations.

Because we are starting from scratch in terms of leadership and contacts, the private sector portion of the campaign will be extremely labor-intensive and time consuming. We are proposing nineteen months for the completion of this portion of the campaign.

6. State Involvement

Earle MacDonnie

State involvement in this campaign is definitely not a given. We suggest pursuing State appropriations for the project late in the campaign, after the credibility and success of the undertaking is evident. Marie Coulton and the western delegation will be the key players in this process.

7. Campaign Structure

The campaign will be overseen by a volunteer steering committee of ten to fifteen people, headed by a Campaign Chairman or Co-Chairmen (see Appendix E). The best scenario for the campaign leadership is to have two co-chairmen, one from the USFS and one from industry, representing the public/private partnership that forms the basis of this project. For both the chairmen and the steering committee members we should seek individuals who

have considerable influence with and access to potential major donors to the campaign.

There will be six campaign subcommittees, each responsible for a major segment of the campaign: Large Industry, Smaller Industry, Individuals, Federal Government, Foundations, and Western North Carolina.

Effective and dedicated leadership is essential to the success of a fund raising campaign, and it is never easy to find. As explained before, due to this project's lack of prior fund raising history, we are operating in a leadership vacuum at this time. Considerable cultivation of prospective leaders will be required. **The general strategy is to draw prospective leaders into the planning process so that they will gain exposure to and ownership of the project**, and then tap these individuals or their friends or colleagues as leaders for the fund raising campaign.

8. Staff and Office

Even with effective volunteer campaign leadership, it is essential that the campaign have a **staff coordinator** who will manage the campaign with the assistance of campaign counsel. This person will provide the continuity that is so important to a concentrated effort such as this.

This person can eventually be paid from the proceeds of the campaign, but funds will need to be made available to fund the position initially.

We suggest that a **campaign office be established in a central location, possibly Asheville.**

9. Campaign Counsel

Because of the lack of fund raising experience on the part of the USFS and the CFAIA, we strongly recommend that fund raising counsel be engaged.

10. Campaign Timetable

We envision that this $2 million campaign will span a nineteen-month period, including three months of preliminary project planning (see Appendix I). If the USFS and CFAIA decide to embark immediately upon the campaign, the planning period would span the summer, with the public kick-off of the campaign in the late fall or winter. the entire campaign would be completed by December of 1989.

The CFA should aim for a Centennial Celebration in the fall of 1991 to commemorate the anniversary of the beginning of Pinchot's work at Pisgah. A grand opening of the new facilities could be planned for this time to cap off the first phase of development of the Cradle of Forestry.

March 11, 1988

Cradle of Forestry in America
Interpretive Association

Mr. Jack Veach, Sr.
Parkway Office Building
Box 5857
Asheville, NC 28805

Dear Mr. Veach:

The Cradle of Forestry in America Interpretive Association is considering a capital campaign for the Cradle of Forestry in America, the birthplace of American forestry and forestry education, in Pisgah Forest in Western North Carolina. The proposed campaign will enable us to establish the Cradle of Forestry in America as the primary forestry interpretation and education center in the United States. The Cradle of Forestry will be a living memorial to the remarkable pioneering work of Gifford Pinchot, Dr. Schenck, and others in the field of forestry.

We are enclosing additional information for your review.

The Cradle of Forestry, in conjunction with the United States Forest Service,. has engaged David Winslow and Associates to assist us in determining the feasibility of the proposed campaign. As a first step in this process, David Winslow and Maggie Mead will conduct interviews with key persons involved with American forestry to gather information on our needs and possible resources. Your input will be very helpful. We will appreciate it if you can make time to meet with Mr. Winslow or Ms. Mead for a short interview.

We will be in touch with you soon to try to arrange a convenient time for an interview.

With much appreciation for your advice and help.

Sincerely,

The Honorable James McClure Clarke
Congressman, 11th District of North Carolina
United States House of Representatives

Bjorn Dahl
Supervisor, National Forests in North Carolina
U.S.D.A. Forest Service

William Towell
Former Executive Director, American Forestry Association
Former President, Society of American Foresters

Jack — A good project. Hope we can get William Towell again. Bill Clarke

APPENDIX B

CRADLE OF FORESTRY IN AMERICA

FEASIBILITY STUDY INTERVIEW

Interviewee:_____

Organization:_____ Title:_____

Interviewer:_____ Date:_____

IMAGE

1. How familiar are you with the Cradle of Forestry in America?

2. Have you ever visited the Cradle of Forestry? When?

3. What drew you to visit the Cradle of Forestry?

4. What, in your opinion, are the most important public services or benefits that the Cradle of Forestry provides?

5. How well known do you think the Cradle of Forestry is?

6. How could the CFA better market its attractions?

CAMPAIGN

7. Do you think that the federal government, national foundations and corporations will support a capital campaign for the CFA? Why or why not?

8. Do you believe that $6 million is attainable from public and private sources for the projects on the Needs List?

9. Can you suggest any individuals, corporations or foundations that are capable of giving at the top level and that might be interested in doing so?

10. Would your company/foundation contribute to this campaign? At what level?

11. Which of the proposed needs would your company/foundation be most interested in supporting? (Show Needs List if necessary.)

12. Would you personally give to the campaign?

13. Considering economic and other factors, is this a good time to launch a major fund raising campaign?

14. Are you aware of any other fund raising campaigns that will take place in the next two years and which would be in direct competition with this one?

15. What do you think would be the major difficulties to be overcome in mounting a capital campaign for the Cradle of Forestry?

16. Do you have any suggestions for how these difficulties might be overcome?

17. What factors might be particularly helpful to such a campaign?

LEADERSHIP

18. Who do you think might be a good chairman for the campaign?

19. Can you suggest other leaders and workers for the campaign?

20. Would you be willing to serve in a key position?

21. If not, would you be willing to help with the campaign?

INTERVIEWER'S OBSERVATIONS

22. Overall disposition of interviewee:

____ enthusiastic	____ very interested
____ mildly interested	____ disinterested
____ negative	

23. Notes:

APPENDIX C

CRADLE OF FORESTRY IN AMERICA

LIST OF INTERVIEWEES

BOARD MEMBERS (22)

Mr. Frank Bell
Tuxedo, NC 28784

Dr. Edward Buckner
University of Tennessee
Post Office Box 1071
Knoxville, TN 37901

Dr. Art Cooper
North Carolina State University
Post Office Box 8002
Raleigh, NC 27695-8002

Mr. Robert Cunningham
Route 2, Box 71-A
Horseshoe, NC 28742

Mr. Gene Dellinger
Social Studies Supervisor
Buncombe County Public Schools
Asheville, NC 28803

Mr. Bernard Elias
25 White Oak Road
Asheville, NC 28803

Mr. Andrew Gennett
Dye Leaf Road
Fairview, NC 28730

Mr. Peter Hanlon
Route 6, Box 277
Fairview, NC 28730

Mr. R. E. Harmon
Post Office Box 949
Hendersonville, NC 28739

Dr. Harley Jolley
116 Anderson Street
Mars Hill, NC 28754

Mr. Granville Liles
Three Fox Chase Road
Asheville, NC 28804

Mr. Clyde Osborne
280 Osborne Road
Brevard, NC 28712

Mr. John Palmer
One Freedlander Drive
Clyde, NC 28721

Mr. John Parris
Post Office Box 638
Sylva, NC 28779

Mr. Verne Rhoades
Post Office Box 8636
Asheville, NC 28814

Mr. David Spain
Dept. of Nat. Res. & Comm. De
Post Office Box 370
Asheville, NC 28802-0370

Dr. Harold Steen
Forest History Society
701 Vickers Avenue
Durham, NC 27701

Mr. Charles Taylor
Burrell Mountain Road
Brevard, NC 28712

Mrs. W. H. Thorne
704 Biltmore Garden Apts.
Asheville, NC 28803

Mrs. Stella Trapp
Post Office Box 32
Brevard, NC 28712

Mr. James K. Vessey
311 East Morse Blvd., Apt. 2-
Winter Park, FL 32789

Ms. Fran Waser
Joree Lane
Brevard, NC 28712

NATIONAL AND STATE FOREST PRODUCTS CORPORATIONS (11)

Mr. John Ball, Senior VP
Champion International Corp.
One Champion Plaza
Stamford, CT 06921

Mr. Ronald Budzik
Executive Director
Mead Foundation
Courthouse Plaza NE
Dayton, OH 45463
513-222-6323

Mr. Douglas Donnell
Forest Products Analyst
Georgia-Pacific Corporation
133 Peachtree Street, NE
Atlanta, GA 30303

Ms. Patricia Freda
Vice President
International Paper Foundation
Two Manhattanville Road
Purchase, NY 10577
914-397-1581

Mr. Fred Hill
Union Camp Corporation
Post Office Box 570
Savannah, GA 31402
912-238-6000

Mr. Richard Hughes
Vice President
Federal Paper Board Company
Post Office Box 338
Bolton, NC 28423
919-452-3701

Mr. Keith Hundley
Director of Public Affairs
Weyerhaeuser Company
Post Office Box 1391
New Bern, NC 28560
919-633-7475

Mr. Walter Jarck
Corp. Dir. for Nat. Resources
Georgia-Pacific Corporation
133 Peachtree Street, NE
Atlanta, GA 30303
404-521-5103

Mr. Jim Pridgen, President
Canal Wood Corporation
Post Office Box 1030
Lumberton, NC 28358
919-739-2887

Mr. Morris Seymour, Director
Fiber Supply Southern Operatic
James River Corporation
Route 114
Pennington, AL 36916
205-459-1293

Ms. Carol Thompson, Director
Corporate Contributions
Champion International Fdn.
One Champion Plaza
Stamford, CT 06921
203-358-7656

STATE FURNITURE CORPORATIONS (2)

Mr. Brent Kinkaid
Vice President, Operations
Broyhill Furniture Industries
Broyhill Park
Lenoir, NC 28633
704-758-3111

Mr. W. Paul Monroe
President
Drexel Heritage Furnishings
Drexel, NC 28619
704-433-3000

NATIONAL AND STATE FOUNDATIONS (4)

Mr. William Bondurant, Exec. Dir.
Mary Reynolds Babcock Foundation
102 Reynolda Village
Winston-Salem, NC 27106
919-748-9222

Mr. Alfred H. Taylor, Jr., Pres.
Kresge Foundation
Post Office Box 3151
Troy, MI 48007-3151
313-643-9630

Mr. Jack E. Murrah, Exec. Dir.
Lyndhurst Foundation
701 Tallan Building
Chattanooga, TN 37402
615-756-0767

Mr. Thomas Lambeth, Exec. Dir.
Z. Smith Reynolds Foundation
101 Reynolda Village
Winston-Salem, NC 27106
919-725-7541

ORGANIZATIONS AND EDUCATIONAL INSTITUTIONS (12)

Mr. Michael Corcoran, Exec. VP
NC Wildlife Federation
P. O. Box 10626
Raleigh, NC 27605
919-833-1923

Dr. George Dutrow, Dean
Duke Univ. School of Forestry
Duke University
Durham, NC 27706
919-684-6090

Dr. Eric Ellwood, Dean
NCSU College of Forest Resources
Box 8001
Raleigh, NC 27695
919-737-2883

Dr. John C. Gordon, Dean
Yale Univ. School of Forestry
205 Prospect Street
New Haven, CT 06511
203-432-5100

Mr. Charles Harden
Society of American Foresters
5400 Grosvenor Lane
Bethesda, MD 20814
301-897-8720

Dr. Robert Kellison
NCSU College of Forest Resources
Box 8002
Raleigh, NC 27695
919-737-3674

Mr. Peter Kirby, SE Rep.
Wilderness Society
1819 Peachtree Rd. NE, Suite 21
Atlanta, GA 30309
404-353-1783

Mr. Neil Sampson, Exec. Dir.
American Forestry Association
1516 P St., NW
Washington, DC 20005
202-667-3300

Mr. Jim Sitts
Columbia Carolina Corporation
Post Office Box 1148
Old Fort, NC 28762
704-724-4191

Ms. Katherine Skinner, Director
NC Nature Conservancy
P. O. Box 805
Chapel Hill, NC 27514
919-967-7007

Mr. Robert Slocum, Jr., Exec.
North Carolina Forestry Assoc.
417 North Boylan Avenue
Raleigh, NC 27603
919-834-3943

Dr. Bruce Zobel
NCSU College of Forest Resourc
Box 8001
Raleigh, NC 27695
919-737-2883

INDIVIDUALS (8)

Dr. Keith Argow
National Woodland Owners
374 Maple Avenue East
Vienna, VA 22180
703-281-7900

Mr. William A. V. Cecil
Firth House
Seven Firth Drive
Asheville, NC 28803

Mrs. Stanley Day
340 Lakeland Avenue
Grosse Pointe, MI 48230

Mr. Gordon Hanes
480 Shepherd Street
Winston-Salem, NC 27103
919-765-7051

Mr. R. Philip Hanes, Jr.
P. O. Box 749
Winston-Salem, NC 27102
919-761-0570

Mrs. George W. Perkins
One East 66th Street
New York, NY 10021

Mr. William Towell
135 Cliff Road
Southern Pines, NC 28387
919-692-2635

Mr. Jack Veach, Sr.
Parkway Office Building
Box 5857
Asheville, NC 28805
704-254-8164

GOVERNMENT (10)

Mr. John E. Alcock
Regional Forester
U.S. Forest Service
1720 Peachtree Road, NW
Atlanta, GA 30367
404-347-4177

Ms. Peggy Barker
Aide to The Hon. Jesse Helms
United States Senator
403 Dirksen Senate Office Bldg.
Washington, DC 20510
202-224-6342

Mr. John Blackwell
Aide to The Hon. Terry Sanford
United States Senator
716 Hart Senate Office Building
Washington, DC 20510
202-224-3154

The Honorable James McC. Clarke
United States Congressman
217 Cannon House Office Building
Washington, DC 20515
202-225-6401

Mr. Jerry Coutant
Chief of Interpretive Servic
USDA Forest Service
US Department of Agriculture
14th and Independence Avenue
Washington, DC 20250

Mr. Bjorn Dahl
Forest Supervisor
USDA Forest Service
National Forests in NC
Post Office Box 2750
Asheville, NC 28802
704-257-4318

Mr. Harry Layman, Director
Division of Forest Resources
NC Dept. of Natural Resource
and Community Development
Post Office Box 27684
512 North Salisbury Street
Raleigh, NC 27611
919-733-2162

GOVERNMENT (continued)

Mr. Douglas MacCleery
Deputy Assistant Secretary
US Department of Agriculture
E. 14th and Independence Avenue
Washington, DC 20250
202-447-7173

The Honorable Liston Ramsey
Speaker of the House
NC House of Representatives
Raleigh, NC 27601
919-733-3451

Mr. Dale Robertson
Chief, USDA Forest Service
USDA, Room 3008
14th and Independence Ave.
Washington, DC 20250
202-447-2791

NOT CONTACTED OR NOT AVAILABLE (6)

lives in Branford 405 corp

Mr. Barry Blalock
Blalock Lumber Company

Mr. Paul Barringer
Coastal Lumber Company

Kimberly-Clark Corporation

Mr. Gifford Pinchot, III

Mr. Frederick B. Starr
Thomasville Furniture Inds.

Mr. Bill Thomas
Sierra Club

REFUSED INTERVIEW (3)

Mr. Fred Hechinger
New York Times Company Foundation

Louisiana-Pacific Corporation

Mr. Gifford Pinchot, II

extremely wealthy
lives in Branford, CT.

CRADLE OF FORESTRY IN AMERICA — APPENDIX D

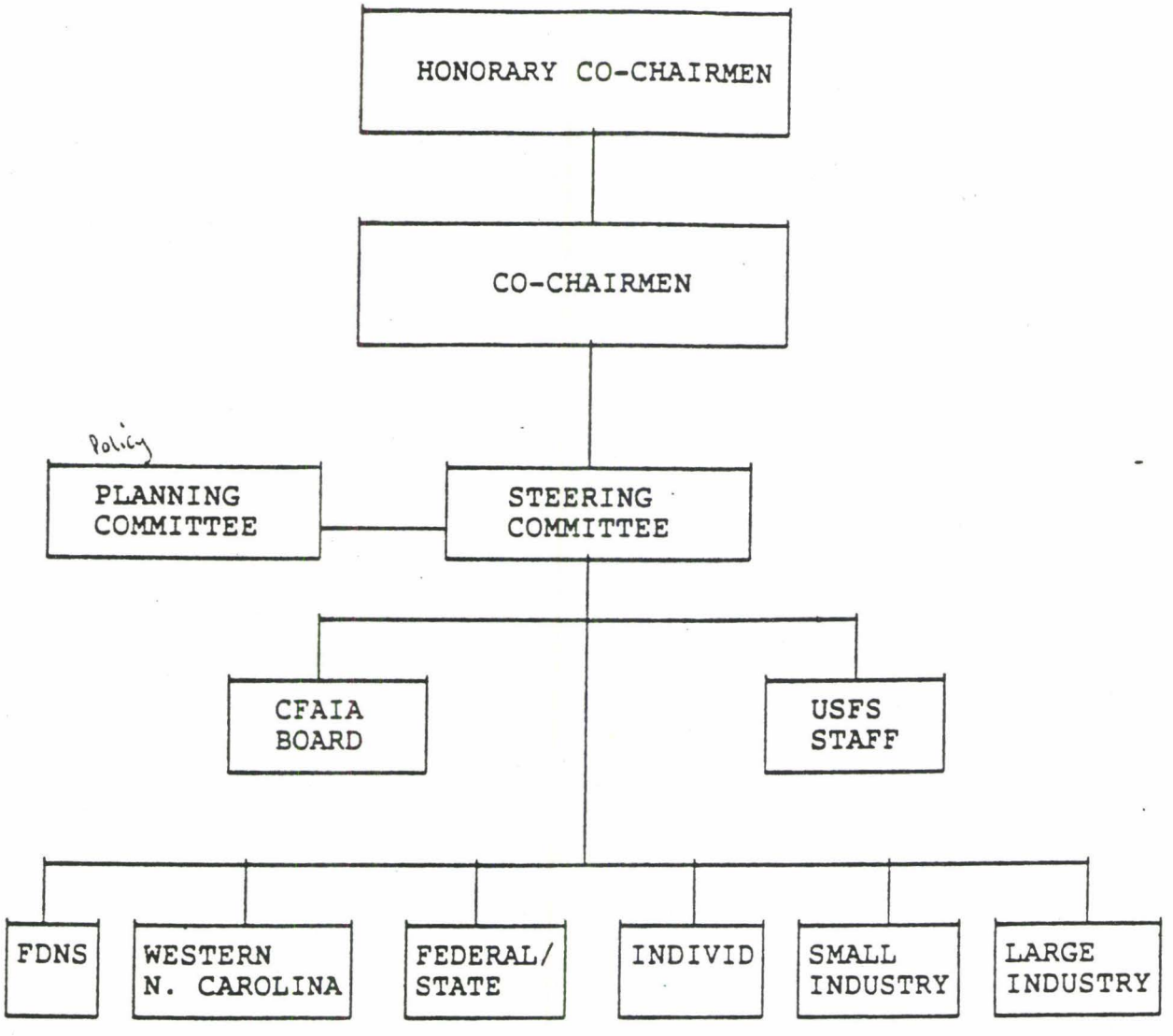
CAMPAIGN OBJECTIVES

1.	Visitor Orientation Center	
	a. Exhibits	350,000
2.	Forest History Center	
	a. Building Design and Construction	1,500,000
	b. Forest History Exhibits	400,000
	c. Parking	125,000
	Subtotal	2,025,000
3.	Forest Resource Center	
	a. Building Design and Construction	1,500,000
	b. Exhibits	470,000
	c. Access Road and Parking	240,000
	Subtotal	2,210,000
4.	Food Service Center	
	a. Building Design and Construction	240,000
	b. Parking	22,000
	Subtotal	262,000
5.	Forest Resource Management Interpretation Area	
	a. Design and Construction of Tram Train Tour	915,000
	b. Purchase and Installation of Tram Train	150,000
	c. Signs and Exhibits	150,000
	Subtotal	1,215,000
6.	Multiple Use Demonstration Area	
	Signs and Exhibits	16,000
7.	Biltmore Campus Trail/Forest Festival Trail	
	Audio-Visual Interpretive Stations	150,000
8.	Fund Raising Costs	622,800
	TOTAL	6,850,800

APPENDIX E

CRADLE OF FORESTRY IN AMERICA

CAMPAIGN ORGANIZATIONAL STRUCTURE



CRADLE OF FORESTRY IN AMERICA

CAMPAIGN LEADERSHIP PROSPECTS

Chairman

Lamar Alexander
Keith Argow
Bill Barton (SAF Council, Union Camp)
Paul Broyhill (Broyhill Foundation)
Alexander Calder (retired, Union Camp)
John Caldwell (former NCSU chancellor)
Bill Cecil
Mimi Cecil
Jamie Clarke
Bob Cunningham
Eric Ellwood (NCSU)
Bill Friday
Mike Frohme (University of Idaho)
John Georges (International Paper Company)
Voit Gilmore (Southern Pines)
Mike Godfrey (Chapel Hill, son of Arthur)
Andy Griffith
Marshall Hahn (Georgia-Pacific)
Pete Hanlon
Howard Haworth (Morganton)
Whitey Heist (Champion)
Alvin Huss (Champion in Chicago)
Carl Jessup (Weyerhaeuser in NC)
Norm Johnson (Weyerhaeuser)
Bob Kellison
Leonard Killian (South Carolina forester)
Bill Lee (Duke Power)
Granville Liles
David Luke (Westvaco)
Tom McClintock (former USFS Experimental Station)
John McGuire (former USFS)
Hugh Morton, Sr. (Grandfather Mountain)
Buck Newsome (Washington)
George Olson
John Parris (AFA and SAF)
Max Peterson (formerly with USFS)
Gifford Pinchot III
Mark Ray (National Forest Products Association)
Reuben Robertson
Neil Sampson
Mr. and Mrs. Sawyer
Ted Schlapfer (Lewis and Clark College)
Andy Siglar (Champion)
Bill Sizemore (Alabama, Duke Forestry)
Arthur V. Smith (retired from Weyerhaeuser)

Chairman (continued)

Stephen Spurr
Pete Steen
Charles Taylor
Roy Taylor
Ted Taylor (Kresge Foundation)
Bill Towell
Edward Van Der Millon (USDA)
Jack Veach
Scott Wallinger (Westvaco in South Carolina)
Jack Warren (Forest Farms Association)
Rudy Wedelin (artist for Smokey Bear)
George Weyerhaeuser — both of Dan. Weyerhaeuser
Bobby Womack (Boise Cascade, Charlotte)

Other Leaders

Gerald Anderson (General Assembly)
John Barber (Washington SAF)
Paul Barringer (Coastal Lumber)
Harold Bate (New Bern)
Charlie Bingham (Weyerhaeuser)
Ronald Bost (Duke Power)
Gene Cartledge (Union Camp)
Dankoff (Champion)
Lynn Weyerhaeuser Day
Almond Grey (Virginia senator)
Hanes family
John Hozner (VPI dean)
Harry Layman
Morris "Mack" McCough (Arboretum)
Harry Merlo (Louisiana Pacific)
Jack Nicklaus (golfer)
Smith Richardson, Jr.
Robertson (Champion)
Colton Robinson
Jim Sitts (NCFA, Old Fort)
Bob Slocum
Stewart Udall
Nat Vaughn (Coastal Lumber)
Jane Yarn

CRADLE OF FORESTRY IN AMERICA

CAMPAIGN GIFT TABLE

$2,000,000 Objective

Number of Gifts	Amount	Total	Cumulative Total
1	$ 1,000,000	$ 1,000,000	$ 1,000,000
1	250,000	250,000	1,250,000
2	100,000	200,000	1,450,000
4	50,000	200,000	1,650,000
5	25,000	125,000	1,775,000
10	10,000	100,000	1,875,000
15	5,000	75,000	1,950,000
20	1,000	20,000	1,970,000
50	500	25,000	1,995,000
Many	<500	5,000	2,000,000

Individuals

- Ned Ames
- Robert Bass
- Charlie Bell
- Biltmore Forestry School grads
- George Cecil
- William Cecil
- Pete Hanlon
- W. S. Hennessee (Sylva)
- Ed Israel
- Hugh Kaul
- Bill Lee
- Art Lobe (VP, Ecusta)
- Gene Lynn
- Mahler family
- Mac McGough
- Hugh Morton
- Pinchot Institute
- Registered foresters
- Verne Rhoades
- Charlie Russell
- Schenck
- Schultz
- Bill Towell
- USFS employees
- Vanderbilt Mansion people
- Nick Van Nelson (Champion, DC)
- Jack Veach
- Bill Sessel Jr.

Organizations

- AFA
- American Paper Institute
- Audubon Society
- Local Chambers of Commerce
- Duke University
- National Forest Products Assoc.
- Nature Conservancy
- North Carolina State University
- SAF
- Sierra Club
- Southeast Forestry Association
- Yale University

Top G/T Prospects (Maggie Mead)

APPENDIX I

CRADLE OF FORESTRY IN AMERICA

CAMPAIGN CALENDAR

1988

June - August

* Establish Planning Committee
* Complete pre-campaign planning
* Begin appropriations process
* Plan and begin implementing PR program

September - December

* Continue appropriations process
* Continue PR
* Secure campaign leadership
* Secure lead gifts
* Build campaign committees
* Install campaign coordinator
* Establish office

1989

January

* Campaign kick-off

January - December

* Complete Large Industry solicitation
* Solicit Smaller Industries
* Individual and association fund raising
* Western NC campaign
* Submit foundation proposals
* Pursue state funds

December

* Complete campaign
* Beginning planning Pinchot Centennial Celebration

APPENDIX J

CRADLE OF FORESTRY IN AMERICA

TENTATIVE CAMPAIGN BUDGET

Materials:		
Fund Raising Brochure	$ 6,500	
Direct Mail Piece, Pledge Cards	4,000	
Press Kit	750	
Stationery, Envelopes, etc.	1,250	
Audio-Visual Presentation	1,000	$ 13,500
Travel, Meals, and Lodging Expenses		10,000
Telephone and Postage		5,000
Nineteen-Month Fund Raising Counsel and Management Fee		130,000
TOTAL		$158,500

CRADLE OF FORESTRY IN AMERICA
CASE STATEMENT

APPENDIX K

I. CONCEPT

The Cradle of Forestry in America Interpretive Association is seeking $6.85 million in public and private funds to further develop the Cradle of Forestry in America as the primary forestry interpretation and education center for the public in the United States. It is the goal of the Association to create a public that is informed about forestry and its role in the economic and environmental health of our country and in the lives of U.S. citizens.

The U.S. forest products industry plays a major role in today's international economy. The 655 million acres of forest lands in the U.S. have enabled the nation to become the world's largest producer of wood products. Revenues of $70.6 billion were produced by the U.S. forest products industry in 1985, totaling 1.8% of the Gross National Product. Of a total labor force of 105 million, 1.9 million jobs in the U.S. are tied to wood products.

Beyond their economic value, forests, both public and private, offer invaluable environmental benefits to all Americans. They are managed to enhance our outdoor recreational pursuits, provide a home for numerous wildlife species, and furnish clean water for our daily consumption.

However, in spite of the size and importance of the U.S. forest products industry, and the role that forests play in our everyday lives, the American public remains largely unaware of the principles of modern forestry and the positive impact that forestry management practices have on the economy and the environment.

The Cradle of Forestry, the birthplace of American forestry and forestry education, is the ideal site for communicating these positive messages to the public. Located in the Pisgah National Forest, the Cradle is situated in the midst of the beautiful western North Carolina mountains that attract millions of visitors from around the world. Utilizing the Cradle of Forestry as an educational center takes advantage not only of the historical significance of the site, but also the proximity of managed forest lands which can be used to demonstrate forestry practices first hand.

II. SIGNIFICANCE

Modern American forestry began in an isolated mountain valley in the Appalachians of North Carolina known as the Pink Beds. Here, on land that was once part of the 100,000 acre Biltmore Estate, George Vanderbilt introduced the concept of managed forests to the United States.

In 1892, Vanderbilt hired Gifford Pinchot, who later founded the U.S. Forest Service, to manage his forests according to principles Pinchot had learned in Europe. The Vanderbilt tract thus became the first large American forest to be actively managed to provide future timber supplies, as well as watershed protection, wildlife habitat, and recreation.

Pinchot's successor, Dr. Carl Schenck, established the nation's first forestry school in 1898 at the Pink Beds. Because of the early efforts of Pinchot, Schenck and the

graduates of the Biltmore Forest School, the concept of "managed" forests became the cornerstone of modern scientific forestry.

In 1914, the Cradle and most of the Biltmore Estate was purchased by the newly-formed U.S. Forest Service. This land became the nucleus of the Pisgah National Forest, the first eastern National Forest.

Congress recognized the historical significance and educational potential of the Cradle of Forestry in 1968. The Cradle of Forestry Act formally established 6540 acres of the Pisgah National Forest surrounding the Pink Beds area as the Cradle of Forestry in America, and in 1976 the Cradle of Forestry was designated as a National Historic Site.

III. USE

The Cradle of Forestry is managed and operated by a partnership between the U.S. Forest Service and the non-profit Cradle of Forestry in America Interpretive Association. The Forest Service is responsible for the day-to-day operations of the Cradle, with the Association providing support services such as volunteer guides, written interpretive materials and educational programs. The Association also implemented and operates the fe system at the Cradle.

Since its establishment, the Cradle of Forestry in America has grown rapidly to be a major attraction in the Southern Appalachians. While only 13,850 visitors stopped at the Cradle in 1966, approximately 224,000 people came to the Cradle in 1984 to take advantag of its exhibits, trails, picnic area and other facilities. This total included visitors from every state in the U.S. and from 45 foreign countries.

The Cradle of Forestry **serves as a major educational resource for teaching forest history and management.** Elementary, middle school and high school students participate in educational programs at the Cradle, and universities and technical colleges from across the nation include the Cradle in their field trip itineraries.

The Cradle of Forestry lies within one of the most heavily utilized National Forests in the U.S. and in close proximity to America's most visited National Park, the Great Smoky Mountains National Park. Approximately 15 million visitors pass through the Pisgah National Forest annually, utilizing the varied recreational resources of the area. The Blue Ridge Parkway, which passes along the northwestern border of the site, was traveled by over 23 million tourists last year. Of these, 292,000 accessed the Parkway via U.S. 276, the route to the Cradle. The Cradle of Forestry lies within 30 miles of Asheville, another major tourist destination, and is easily accessible to Interstates 26 and 40.

Although the Cradle is already very heavily utilized, additional publicity and marketing will tap a huge potential for visitation. It is well located to fit easily into a travel itinerary of the Southern Appalachians. The numerous other attractions in the vicinity provide an immediate market for visitors to the Cradle of Forestry. Additional development and publicity will put the Cradle on the map for hundreds of thousands of potential visitors.

IV. NEEDS

Establishing the Cradle of Forestry as the primary interpretive and educational site in the U.S. for forestry requires substantial expansion of the Cradle's current facilities. The increase in visitation brought about by the creation of additional attractions at the Cradle will require provisions for visitor comfort and safety as well.

The Management Plan for the Cradle of Forestry developed by the U.S. Forest Service in 1985 details the development necessary to achieve the goals adopted by the Cradle of Forestry in America Interpretive Association.

1. Visitor Orientation Center Exhibits ($350,000)

The original Visitor Orientation Center was destroyed by fire of unknown origin in 1985. Since that tragedy, visitor services have been provided by a small temporary facility. In a demonstration of its initial support for the Cradle of Forestry project, the federal government has appropriated $900,000 to rebuild the Visitor Orientation Center. The new Center, which is currently under construction, will provide general visitor information services, with exhibits explaining the historical significance of the Cradle and orienting visitors to interpretive facilities at the Cradle.

The Visitor Orientation Center is slated to be completed by mid-1988. However, the interior exhibits remain to be designed and installed.

2. Forest History Center ($2,025,000)

The Forest History Center will serve as an educational center, emphasizing the progressive development of forestry, the forest products industry, and the natural resource conservation movement in America. It will contain educational exhibits, an auditorium for educational programs, a conference room, storage area for forestry artifacts and archives, and laboratory for preparation of historical exhibits.

Development of the Forest History Center will require building design, exhibit design and installation, and design and construction of additional visitor parking.

3. Forest Resource Center ($2,210,000)

The Forest Resource Center will serve as the primary educational facility for forest resource management and resource conservation at the Cradle. It will be available for use by the general public, institutions, and government agencies. The interpretive emphasis will be the development and progression of multiple use forest resource management and the role of multiple use management today and in the future.

Development of the Forest Resource Center will require building design and construction, exhibit design and installation, and the design and construction of an access road and parking.

4. Food Service Center ($262,000)

As additional interpretive and educational facilities are added, the Cradle will become more of a destination trip for visitors who may easily spend an entire day at the Cradle. Because of the Cradle's remote location, food service facilities must be provided at the Cradle to allow visitors to take full advantage of the Cradle of Forestry's attractions.

5. Forest Resource Management Interpretation Area ($1,215,000)

Effective interpretation of forest resource management must include demonstration of actual management activities. It is one of the primary advantages of the Cradle's size and location that these activites can be observed close at hand.

The Forest Resource Management Interpretive area will illustrate past and present techniques and equipment used in resource management, utilization, protection and research

This area will be accessed by a loop road built through the interpretive area. During the busy season, visitors will be carried through the area on a tram train. During the off season, visitors could drive their own cars along the road.

Costs include the contruction of the road, purchase and installation of the tram train, and interpretive signs and exhibits.

6. Multiple Use Demonstration Area ($16,000)

The entire Cradle of Forestry, with the exception of developed and interpretive sites, will be used as a Demonstration Area to illustrate the actual full scale practice of intensive forest resource management. The techniques and management practices described the Forest Resource Management Interpretive Area will be demonstrated throughout the Cr of Forestry as a living example of definition, practice, and value of multiple use and sustained yield management.

Utilization of the Cradle of Forestry as a Demonstration Area will require only the design and installation of exhibits interpreting ongoing forest management activities.

7. Biltmore Campus Trail and Forest Festival Trail ($150,000)

Additional interpretive stations are planned along both of these existing interpretive trails to enhance the interpretation of forestry education and research in America and the development and progress of forest practices and utilization.

V. THE CAMPAIGN

Approximately $6.5 million is required to develop the Cradle of Forestry to its fullest potential. Recognizing that government appropriations must form the foundation fo the funding required to develop the Cradle of Forestry, and the Association is already

taking the necessary steps to obtain these appropriations for both the development and the operation of the Cradle. However, public funds will not be available to accomplish fully the Association's goals. Therefore, the Association is also seeking support from the private sector.

A successful capital campaign and the progressive development of the Cradle of Forestry will be a great testament to both the U.S. Forest Service and the U.S. forest products industry. It will ultimately enable the Cradle of Forestry to fulfill its Congressional mandate:

> "...to preserve, develop, and make available to this and future generations the birthplace of forestry and forestry education in America and to promote, demonstrate, and stimulate interest in and knowledge of the management of forest lands...".

APPENDI

PRELIMINARY RESEARCH OF CORPORATE AND FOUNDATION GIVING
FOR THE CRADLE OF FORESTRY IN AMERICA INTERPRETIVE ASSOCIATION

	Activities Supported				
	Bldg. Funds	Cap. Camps.	Oper. Budget	Special Projects	General Support
Abbott Laboratories			M*		
ABC Foundation	HP,M				HP,M
Aetna Life and Casualty Co.			HP		
Affiliated Publications		E,HP,M	E,HP,M	E,HP,M	
Air Products and Chemicals	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Akers Foundation					M
Akzona Foundation	HP,M				HP,M
Allegis Corporation			E,M	E,M	
Allied-Signal, Inc.	M	M		M	
Allstate Insurance Company			HP,M	HP,M	
Aluminum Company of America	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Amax	M	M	M	M	
American Cyanamid Company		M	M	M	
American Express Company				HP,M	
American Medical Intl., Inc.		M		M	
American Nat. Resources Co.	M	M		M	
AT&T		E,M	E,M	E,M	
Ametek	HP,M	HP,M		HP,M	
Amfac, Inc.	M	M	M		
Amoco Corporation	C,E,HP	C,E,HP	C,E,HP	C,E,HP	
Amp, Incorporated	M	M		M	
Anheuser-Busch Companies	E	E			
Aon Corporation		M			
Archer Daniels Midland Co.		E,HP,M	E,HP,M	E,HP,M	
ARCO			E,HP,M	E,HP,M	
Armco, Inc.		E	E,M	E,M	
Evenor Armington Fund			C,E	C,E	
Asarco, Inc.	E	E		E	
Avon Products, Inc.			M	M	
Mary Reynolds Babcock Fdn.			E	E	
BankAmerica Corporation	E,M	E,M	E,M	E,M	
Bankers Trust New York Corp.		E,HP,M	E,HP,M		
BarclaysAmerican Fdn.	C,HP,M				C,HP,M
Bechtel Power Corporation	E,M		E,M		
Belk-Beck Company, Inc.	M	M			
John M. Belk Foundation	M			M	
Bell Atlantic Corporation				HP	
Bellsouth Corporation				M	

Boldface indicates corporations/foundations with North Carolina location(

*Funding areas: C=Conservation; E=Environment; HP=Historic Preservation
M=Museums

**Sources do not indicate national/regional giving.

	Activities Supported				
	Bldg. Funds	Cap. Camps.	Oper. Budget	Special Projects	General Support
Beneficial Corporation		E,M	E,M		
Best Products Company, Inc.		M		M	
Black and Decker Company**	M	M	M	M	
Blount, Inc.		M		M	
Blue Bell Foundation	C,HP,M				C,HP,M
Blumenthal Foundation					C,HP,M
Boeing Company	M	M			
Boise-Cascade Corporation		E,HP,M	E,HP,M	E,HP,M	
Borg-Warner Corporation	M	M	M	M	
Boston Edison Company		M	M	M	
Bowater, Inc.	No giving information available.				
BP America	E,M	E,M	E,M	E,M	
Broyhill Foundation	HP				HP
Bryan Family Foundation	HP				HP
Burlington Industries	E,HP,M	E,HP,M			E,HP,M
Bydale Foundation			E	E	
Campbell Soup Company	E,M	E,M		E,M	
Cannon Foundation	HP				HP
Capital Cities/ABC, Inc.	M	M		M	
Carolina Power and Light	E,M	E,M			
Central Soya Company, Inc.**		HP,M	HP,M		
Century Foundation	Gives to HP and M. Support types N/A.				
Champion International Corp.	E,M	E,M		E,M	
Chase Manhattan Corporation			E,HP,M	E,HP,M	
Chatham Foundation					C,HP
Chevron Corporation			E,HP,M	E,HP,M	
Chicago Tribune				M	
Chrysler Corporation		E,HP,M			
Cigna Corporation			HP,M	HP,M	
Citicorp/Citibank			HP,M	HP,M	
Clorox Company	M			M	
Community Fdn. of Western NC	Gives seed monies to C, HP, and M.				
Compton Foundation, Inc.			C	C	
Connecticut Mutual Life Ins.		M	M	M	
Consolidated Freightways	E,M				
Consolidated Papers, Inc.	E,M	E,M	E,M	E,M	
Continental Corporation			M		
Cooper Industries	M	M	M	M	
Copley Newspapers/Press	HP,M			HP,M	
Corning Glass Works	HP,M	HP,M		HP,M	
Jessie B. Cox Char. Trust				C,E	

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	Activities Supported				
	Bldg. Funds	Cap. Camps.	Oper. Budget	Special Projects	General Support
Crum and Forster Corporation	E,HP,M			E,HP,M	
C.S. Fund				E	
CSX Corporation		E,HP,M	E,HP,M		
Culbertson Foundation	Gives to HP and M. Support types				N/A.
Cummins Engine Company		E	E	E	
Dana Corporation	M		M		
E. W. and C. M. Davis Fdn.			E		
Dayton Hudson Corporation				M	
Deluxe Check Printers**	E,M	E,M	E,M	E,M	
Dexter Corporation**		E,HP,M	E,HP,M		
Dickson Foundation, Inc.					C,HP,M
Rush S. Dickson Family Fdn.					HP,M
Digital Equipment Corp.				E,M	
Dillard Fund, Inc.	C,HP,M				C,HP,M
Walt Disney Company	E,M	E,M	E,M	E,M	
Geraldine R. Dodge Fdn.				E	
R. R. Donnelley and Sons	E,M	E,M		E,M	
Dorr Foundation		C,E	C,E	C,E	
Dresser Industries	E,M	E,M	E,M	E,M	-
Duke Power Company	E,M		E,M	E,M	
E. I. duPont de Nemours & Co.		E,M		E,M	
Duquesne Light Company		M	M	M	
Eastern Gas and Fuel Assoc.	M	M	M	M	
Eastman Kodak Company			M	M	
Eaton Corporation	M	M	M		
Charles Edison Fund			HP	HP	
Emerson Electric Company	HP	HP	HP	HP	
Emhart Corporation		E,HP	E	E,HP	
Charles Engelhard Foundation				C	
Enron Corporation		E,HP,M	E,HP,M		
Equitable Life Assurance				M	
T. M. Evans Foundation	HP	HP	HP		
Exxon Corporation	E,HP,M	E,HP,M		E,HP,M	
Farley/Northwest Inds., Inc.		E,HP,M	E,HP,M	E,HP,M	
Federal Express Corporation	E,M	E,M	E,M	E,M	
Federal-Mogul Corporation	HP,M	HP,M	HP,M	HP,M	
Federal Paper Board Company	No giving information available.				
Federated Department Stores	HP,M	HP,M		HP,M	
Doak Finch Foundation					HP
Firestone Tire & Rubber Co.	E,HP,M		E,HP,M	E,HP,M	
First Bank System	E,HP,M	E,HP,M	E,HP,M	E,HP,M	

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	Activities Supported				
	Bldg. Funds	Cap. Camps.	Oper. Budget	Special Projects	General Support
First Union Corporation	HP,M	HP,M	HP,M	HP,M	
FMC Corporation	M	M			
The Ford Foundation				E	
Ford Motor Company	E,HP,M		E,HP,M	E,HP,M	
Foundation for the Carolinas	E,HP,M	E,HP,M	E,HP,M	E,HP,M	E,HP,M
Freeport-McMoran, Inc.				M	
Friendship Fund	E			E	
Sarah Belk Gambrell Fdn.					HP
GATX Corporation			E,M	E,M	
Gencorp, Inc.	E	E	E		
General Service Foundation				C,E	
General Dynamics Corporation		M	M		
General Electric Company				E,HP,M	
General Foods Corporation	HP,M	HP,M		HP,M	
General Mills, Inc.	HP,M	HP,M	HP,M	HP,M	
General Motors Corporation	HP,M	HP,M	HP,M	HP,M	
Genrad, Inc.		E,HP,M		E,HP,M	
Georgia-Pacific Corporation	E,M	E,M	E,M	E,M	
Giant Food, Inc.			E,M		
Glencoe Foundation, Inc.	HP		HP		
Goodman Foundation	Gives to HP and M. Support types N/A.				
Gould, Inc.		E,HP,M	E,HP,M	E,HP,M	
W. R. Grace and Co.	E,M	E,M	E,M		
Graco, Inc.		E,HP,M		E,HP,M	
Great Northern Nekoosa Fdn.	No giving information available.				
GTE Corporation	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Hallmark Cards**	HP,M	HP,M	HP,M	HP,M	
Hammermill Paper Company	E,HP,M	E,HP,M			
James G. Hanes Mem. Fund	C			C	C,HP,M
John and Anna Hanes Fdn.	HP			HP	C,HP,M
Harder Foundation			E		
Hartford Insurance Group		M	M	M	
Hartmarx Corporation		M		M	
H. J. Heinz Company	HP,M	HP,M	HP,M	HP,M	
Alex Hemby Foundation	Gives to museums. Activities N/A.				
Hershey Foods Corporation			M		
Hillsdale Fund	HP,M				HP,M
Hitachi, Ltd.				M	
HKH Foundation				E	
Hoescht Celanese Corporation		E,M	E,M	E,M	
Holiday Corporation				HP,M	

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	Activities Supported				
	Bldg. Funds	Cap. Camps.	Oper. Budget	Special Projects	General Support
Honeywell, Inc.	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Hospital Corp. of America		HP,M		HP,M	
Illinois Tool Works, Inc.		M			
Intel Corporation				M	
Interco, Incorporated	M	M	M	M	
Interlake Corporation	M	M	M	M	
International Bus. Machines		HP,M	HP,M	HP,M	
Int. Minerals and Chemicals				E,M	
Int. Multifoods Corporation				E,M	
International Paper Company	E,HP,M	E,HP,M		E,HP,M	
Island Foundation (Mass.)			C,E	C,E	
ITT Corporation	HP,M	HP,M	HP,M	HP,M	
Ivey's Trust Fund					HP,M
James River Corporation		E,HP,M			
S. C. Johnson and Sons	E,HP,M	E,HP,M		E,HP,M	
Johnson & Johnson		HP,M	HP,M	HP,M	
Johnson Controls	E,HP,M	E,HP,M		E,HP,M	
W. Alton Jones Foundation			C,E	C,E	
Jostens, Inc.		M	M	M	-
Kellenberger Historical Fdn.	HP			HP	
Henry P. Kendall Foundation			C,E	C,E	
Kettering Family Foundation	C		C	C	
Kidder Peabody and Co.		M			
Peter Kiewit Sons', Inc.		E,HP,M	E,HP,M	E,HP,M	
J. W. Kieckhefer Foundation	E		E	E	
Kimberly-Clark Corporation		E,HP,M	E,HP,M	E,HP,M	
Koppers Company, Inc.		E,HP,M	E,HP,M		
Kraft, Inc.		E,M	E,M	M	
Kresge Foundation	C				
Laclede Gas Company	E,M	E,M	E,M		
Lance Foundation	C,HP,M				C,HP,M
Norton Laird Foundation	C,E			C,E	
Lakeview Fund			E	C,E	
Landmark Communications	HP,M	HP,M		HP,M	
Max and Anna Levinson Fdn.				E	
Eli Lilly and Company		E,HP,M	E,HP,M	E,HP,M	
Lincoln National Corporation	M	M	M	M	
Effie Allen Little Foundation	Gives to HP and M. Support types				N/A.
Louisiana-Pacific Foundation	No giving information available.				
Lukens Foundation	C				
J. D. & C. T. MacArthur Fdn.			C,E	C,E	

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	Activities Supported				
	Bldg. Funds	Cap. Camps.	Oper. Budget	Special Projects	General Support
Manufacturers Hanover Corp.		E,M	E,M		
Mapco, Inc.	M	M	M	M	
Marathon Oil Company	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Marsh Foundation	Gives to museums. Support types N/A.				
Mattel, Inc.			M	M	
May Department Stores Co.		HP,M		HP,M	
McDermott International, Inc.			M	M	
McDonald's Corporation				HP	
McDonnell Douglas Corp.		HP,M	HP,M	HP,M	
McGraw-Hill, Inc.			E,M	E,M	
McKesson Corporation			E,HP,M	E,HP,M	
Mead Corporation	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Mellon Bank Corporation	HP,M	HP,M	HP,M	HP,M	
Andrew W. Mellon Foundation				C,E,HP	
Melville Corporation	M	M	M		
Merrill Lynch and Co.		HP,M	HP,M		
Joyce Mertz-Gilmore Fdn.			E	E	
Metropolitan Life Ins. Co.			E,M	E,M	
Milliken and Company	E				
Minnesota Mining/Mfg. Co.			E,HP,M	E,HP,M	
Mobil Corporation		E,HP,M	E,HP,M	E,HP,M	
Monsanto	E,HP,M	E,HP,M	E,HP,M		
Morgan Guaranty Trust Company	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Morgan Stanley Group, Inc.			M		
Motorola, Inc.		HP,M		HP,M	
Charles Stewart Mott Fdn.			E	E	
Ruth Mott Fund			C,E	C,E	
Myers-Ti Caro Foundation	M			M	
Nalco Chemical Company	HP,M	HP,M	HP,M	HP,M	
NBD Bancorp, Inc.	HP,M	HP,M		HP,M	
Nationwide Insurance	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
NCR Corporation	HP,M	HP,M	HP,M	HP,M	
Needmor Fund				E	
Neisler Foundation	Gives to HP. Support types N/A.				
Newland Foundation			E	E	
New York Times Company			E,M	E,M	
Niagara Mohawk Power Corp.	M	M			
NL Industries			E,HP,M		
Nolan Foundation			HP		
Norfolk Southern Corp.	E,M	E,M	E,M	E,M	
Northrop Corporation		M	M	M	

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	Activities Supported				
	Bldg. Funds	Cap. Camps.	Oper. Budget	Special Projects	General Support
Norton Company	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Occidental Petroleum Corp.	E	E	E	E	
O'Herron Foundation	Gives to HP. Support types N/A.				
Olin Corporation	E,C	E,HP	C,E,HP	C,E,HP	
Ottinger Foundation				E	
Paccar, Inc.	HP,M	HP,M	HP,M		
Pacific Gas and Electric Co.			E,HP	E,HP	
Pacific Telesis Group			E,HP,M	E,HP,M	
Parker Hannifin Corp.	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
James C. Penney Foundation			E	E	
Pennzoil Company			E,HP,M	E,HP,M	
PepsiCo			HP,M	HP,M	
Perkin-Elmer Corporation	E,M	E,M	E,M		
J. N. Pew, Jr. Char. Trust	C		C	C	
Phelps Dodge Corporation			E,HP,M	E,HP,M	
Philip Morris Companies			E,M	E,M	
Phillips Petroleum Company	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Piedmont Aviation Foundation	HP,M				
Pillsbury Company	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Polaroid Corporation	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
PPG Industries	HP,M	HP,M	HP,M	HP,M	
Mary Norris Preyer Foundation	Gives to C and HP. Support types N/A.				
Procter and Gamble Company	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Provident Life & Accident Ins		E		E	
Prudential Insurance Company		E,HP,M	E,HP,M	E,HP,M	
Public Service Enterprise Gp.	HP,M	HP,M		HP,M	
Public Welfare Foundation		E	E	E	
Quaker Oats Company	M	M	M	M	
Reader's Digest Association			E,HP,M	E,HP,M	
Reliance Electric Company	HP,M	HP,M	HP,M		
Rexnord, Inc.				E,HP,M	
Z. Smith Reynolds Foundation	E		E	E	E
Reynolds Metals Company	E,M	E,M	E,M	E,M	
Grace Jones Richardson Trust					C,E,HP,
H. Smith Richardson Fdn.					HP,E
RJR Nabisco		E,HP,M	E,HP,M	E,HP,M	
Rockefeller Brothers Fund				C,E	
Rockefeller Family Fund			C,E	C,E	
Rockwell International Corp.		HP,M		HP,M	
Rolscreen Company	HP	HP			
Safeco Corporation	E	E	E	E	

Boldface indicates corporations/foundations with North Carolina locatio

*Funding areas: C=Conservation; E=Environment; HP=Historic Preservati
M=Museums

**Sources do not indicate national/regional giving.

	Activities Supported				
	Bldg. Funds	Cap. Camps.	Oper. Budget	Special Projects	General Support.
Salomon, Inc.			M		
Santa Fe Southern Pacific		M			
Sara Lee Corporation				M	
Schering-Plough, Inc.	HP,M		HP,M	HP,M	
Scherman Foundation			C	C	
Schlumberger Ltd.	E,M			E,M	
Scott Paper Company			M	M	
Security Pacific Corporation		E,HP,M	E,HP,M		
Sequoia Foundation	E		E	E	
Shalan Foundation				E	
Shell Oil Company	E,M	E,M	E,M	E,M	
Sherwin-Williams Company**	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Sing Foundation	Gives to C and HP. Support types N/A.				
L. C. and Mary C. Skaggs Fdn.				HP	
Smithkline Beckman Corp.	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
South Branch Foundation				C	
Southern Bell Telephone		E,M	E,M	E,M	
Southern Company	M	M			
Sovran Financial Corporation	HP,M	HP,M	HP,M		
Spokane Inland NW Comm. Fdn.				HP	
Square D Company	M	M	M	M	
Stanley Works		E,M		E,M	
Steelcase, Inc.	E,HP		E,HP		
; Drug, Inc.	M	M	M	M	
. Stevens and Company			HP,M	HP,M	
George B. Storer Foundation	C				
Robert Lee Stowe Jr. Fdn.					C,HP,M
Stroud Foundation	E				
Sun Company, Inc.		E,M	E,M	E,M	
Sundstrand Corporation	HP,M	HP,M	HP,M	HP,M	
Tektronix, Inc.	E,M	E,M		E,M	
Temple-Inland, Inc.		M			
Texaco, Inc.	E,HP,M			E,HP,M	
Texas Instruments, Inc.	M		M		
Textron, Inc.**		HP,M		HP,M	
Oakleigh L. Thorne Fdn.	C	C	C	C	
Ticor Corporation	E,M	E,M	E,M		
Time, Inc.				E,M	
Times Mirror Company	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
Timken Company	E,HP,M		E,HP,M	E,HP,M	E,HP,M
Town Creek Foundation			C,E	C,E	

Boldface indicates corporations/foundations with North Carolina location(

*Funding areas: C=Conservation; E=Environment; HP=Historic Preservation
M=Museums

**Sources do not indicate national/regional giving.

	Activities Supported				
	Bldg. Funds	Cap. Camps.	Oper. Budget	Special Projects	General Support
Toyota Motor Sales USA, Inc.		M	M		
Transamerica Corporation	E	E	E	E	
Transco Energy Company	E,M	E,M	E,M	E,M	
Travelers Corporation		E,HP	E,HP	E,HP	
Triangle Publications, Inc.	HP,M				
TRW, Inc.	E,HP,M				
Marcia Brady Tucker Fdn.		C,E			
Union Camp Corporation**		E	E		
Union Pacific Corporation	E,HP,M	E,HP,M	E,HP,M	E,HP,M	
United States Sugar Corp.			E		
United Technologies Corp.		E,M		E,M	
United Telecommunications		M		M	
Unocal	E		E	E	
Unum Life Insurance Company		HP,M	HP,M	HP,M	
USF&G Corporation		E,HP,M	E,HP,M	E,HP,M	
USG Corporation		M	M	M	
USX		E,HP,M	E,HP,M	E,HP,M	
Philip L. Van Every Fdn.	C,HP,M	C,HP,M			
Vulcan Materials Company	HP,M	HP,M			
Wachovia Corporation	HP,M				
DeWitt Wallace Fund			C	C	
Warner Communications	M	M			
Warner-Lambert Company	HP,M	HP,M	HP,M	HP,M	
Wells Fargo and Company			E,HP,M	E,HP,M	
Westinghouse Electric Corp.	E,M	E,M		E,M	
Westvaco Corporation		E,M	E,M		
Weyerhaeuser Company	C		E,M	C,E,M	
Whitehall Foundation				E	
Winn-Dixie Stores				M	
Wisconsin Energy Corporation		M	M	M	
Wyman-Gordon Company	HP,M	HP,M		HP,M	
Xerox Corporation			E,HP,M	E,HP,M	

Sources:

The Foundation Directory, The Foundation Center. 11th edition, 1987.
Corporate 500: Directory of Corporate Philanthropy, Public Management Institute. 6th edition, 1987.
National Data Book, The Foundation Center. 11th edition, 1987.
Grantseeking in North Carolina: A Guide to Foundation and Corporate Giving, North Carolina Center for Public Policy Research. Written and compiled by Anita Gunn Shirley. 1985.

Boldface indicates corporations/foundations with North Carolina location(s

*Funding areas: C=Conservation; E=Environment; HP=Historic Preservation; M=Museums

**Sources do not indicate national/regional giving.

RFP - CFA
FEASIBILITY STUDY
JANUARY 1988

SECTION L - INSTRUCTIONS, CONDITIONS, AND NOTICES TO OFFERORS

L.1 SOLICITATION PROVISIONS INCORPORATED BY REFERENCE (FAR 52.252-1) (APR 1984)

This solicitation incorporates the following provisions by reference. These provisions have the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available.

I. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) SOLICITATION PROVISIONS

PROVISION NUMBER	DATE	TITLE
52.215-5	APR 1984	SOLICITATION DEFINITIONS
52.215-7	APR 1984	UNNECESSARILY ELABORATE PROPOSALS OR QUOTATIONS
52.215-8	APR 1984	ACKNOWLEDGEMENT OF AMENDMENTS TO SOLICITATIONS
52.215-9	APR 1984	SUBMISSION OF OFFERS
52.215-10	APR 1984	LATE SUBMISSIONS, MODIFICATIONS, AND WITHDRAWALS OF PROPOSALS
52.215-12	APR 1984	RESTRICTION ON DISCLOSURE AND USE OF DATA
52.215-13	APR 1984	PREPARATION OF OFFERS
52.215-14	APR 1984	EXPLANATION TO PROSPECTIVE OFFERORS
52.215-15	APR 1984	FAILURE TO SUBMIT OFFER
52.232-13	APR 1984	NOTICE OF PROGRESS PAYMENTS

L.2 INQUIRIES (USDA 452.204-71) (JUL 1985)

Inquiries and all correspondence concerning this solicitation document should be submitted in writing to the Contracting Officer. OFFERORS ARE INSTRUCTED SPECIFICALLY TO CONTACT ONLY THE CONTRACTING OFFICER ISSUING THE SOLICITATION ABOUT ANY ASPECT OF THIS REQUIREMENT PRIOR TO CONTRACT AWARD.

L.3 CONTRACT AWARD (FAR 52.215-16) (APR 1985)

(a) The Government will award a contract resulting from this solicitation to the responsible offeror whose offer conforming to the solicitation will be most advantageous to the Government, cost or price and other factors, specified elsewhere in this solicitation, considered.

(b) The Government may (1) reject any or all offers if such action is in the public interest, (2) accept other than the lowest offer, and (3) waive informalities and minor irregularities in offers received.

(c) The Government may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the offeror's best terms from a cost or price and technical standpoint.

(d) The Government may accept any item or group of items of an offer, unless the offeror qualifies the offer by specific limitations. UNLESS OTHERWISE PROVIDED IN THE SCHEDULE, OFFERS MAY BE SUBMITTED FOR QUANTITIES LESS THAN THOSE SPECIFIED. THE GOVERNMENT RESERVES THE RIGHT TO MAKE AN AWARD ON ANY ITEM FOR A QUANTITY LESS THAN THE QUANTITY OFFERED, AT THE UNIT COST OR PRICES OFFERED, UNLESS THE OFFEROR SPECIFIES OTHERWISE IN THE OFFER.

(e) A written award or acceptance of offer mailed or otherwise furnished to the successful offeror within the time for acceptance specified in the offer shall result in a binding contract without further action by either party. Before the offer's specified expiration time, the Government may accept an offer (or part of an offer, as provided in paragraph (d) above), whether or not there are negotiations after its receipt, unless a written notice of withdrawal is received before award. Negotiations conducted after receipt of an offer do not constitute a rejection or counteroffer by the Government.

(f) Neither financial data submitted with an offer, nor representations concerning facilities or financing, will form a part of the resulting contract. However, if the resulting contract contains a clause providing for price reduction for defective cost or pricing data, the contract price will be subject to reduction if cost or pricing data furnished is incomplete, inaccurate, or not current.

L.4 INSTRUCTIONS FOR THE PREPARATION OF TECHNICAL AND COST OR PRICING PROPOSALS (USDA 452.215-71) (JUL 1985)

(a) General Instructions

The following instructions establish the acceptable minimum requirements for the format and content of proposals:

(1) Any resultant contract shall include the general provisions applicable to the selected offeror's organization and type of contract awarded. Any additional clauses required by public law, executive order, or acquisition regulations in effect at the time of execution of the proposed contract will be included.

(2) The proposal must be prepared in two parts: a technical proposal and a business proposal. Each of the parts shall be separate and complete in itself so that evaluation of one may be accomplished independently from evaluation of the other. The technical proposal must not contain reference to cost; however, resource information (such as data concerning labor hours and categories, materials, subcontracts, etc.) must be contained in the technical proposal so that the contractor's understanding of the statement of work may be evaluated. It must disclose the contractor's technical approach in sufficient detail to provide a clear and concise presentation that includes, but is not limited to, the requirement of the technical proposal instructions.

(3) Offerors may, at their discretion, submit alternate proposals or proposals which deviate from the requirement; provided, that an offeror also submit a proposal for performance of the work as specified in the statement of work. Any "alternate" proposal may be considered if overall performance would be improved or not compromised, and if it is in the best interest of the Government. Alternate proposals, or deviations from any requirement of this RFP, must be clearly identified.

(4) The Government will evaluate proposals in accordance with the evaluation criteria set forth in Section M of this RFP.

(b) Technical Proposal Instructions

(1) Proposals which merely offer to conduct a program in accordance with the requirements of the Government's statement of work will not be eligible for award. The contractor must submit an explanation of it's proposed technical approach in conjunction with the tasks to be performed in achieving the project objectives.

(2) A detailed work plan must be submitted indicating how each aspect of the statement of work is to be accomplished. The technical approach should be in as much detail as the offeror considers necessary to fully explain the proposed technical approach or method. The technical proposal should reflect a clear understanding of the nature of the work being undertaken.

(3) The technical proposal must include information on how the project is to be organized, staffed, and managed. Information should be provided which will demonstrate the offeror's understanding and management of important events or tasks. The offeror must explain how the management and coordination of consultant and/or subcontractor efforts will be accomplished.

(4) The technical proposal must include a list of names and proposed duties of the professional personnel, consultants, and

key subcontractor employees assigned to the project. Their resumes should be included and should contain information on education, background, recent work experience, and specific scientific or technical accomplishments. The approximate percentage of time each individual will be available for this project must be included. The proposed staff hours for each of the above individuals should be allocated against each task or subtask for the project.

(5) The technical proposal must provide the general background, experience, and qualifications of the organization. Similar or related contracts, subcontracts, and/or grants should be included and/or each contain the name of the customer, contract number, dollar amount, time of performance, and the names and telephone numbers of the project officer and contracting/grants officer.

(6) The technical proposal must contain a discussion of present or proposed facilities and equipment which will be used in the performance of the contract.

(c) Business Proposal Instructions

(1) General Requirements

To reduce subsequent requests to offerors for additional data in support of proposed costs, the following information is required:

(i) Cost proposals must be submitted in accordance with FAR 15.804-6 by using Standard Form 1411, Contract Pricing Proposal Cover Sheet, and Table 15-2, Instructions for Submission of a Contract Pricing Proposal.

(ii) The offeror shall submit separate cost or pricing data for the following:

(A) Options to extend the term of the contract

(B) Options specified in the proposed statement of work

(C) Major tasks, if required by special instruction

(2) Specific Requirements

The offeror must also submit the following detailed information to support the proposed budget:

(i) Breakdown of direct labor cost by named person or labor category including number of labor-hours and current actual or average hourly rates. Indicate whether current rates or escalated rates are used. If escalation is included, state the degree (percent) and methodology. Direct labor or levels of effort are to be identified as labor-hours and not as a percentage of an individual's time. Indicate fringe benefit rate, if separate from

indirect cost rate.

(ii) The amount proposed for travel, subsistence and local transportation supported with a breakdown which includes: number of trips anticipated, cost per trip per person, destination(s) proposed, number of person(s) scheduled for travel, mode of transportation, and mileage allowances if privately owned vehicles will be used.

(iii) Cost breakdown of materials, equipment and other direct costs including duplication/reproduction, meetings and conferences, postage, communication and any other applicable items. Costs must be supported by specific methodology utilized.

(iv) If an offeror proposes to employ the use of an Automatic Data Processing System (ADPS), detailed data concerning proposed costs should include the following:

(A) Make and model year of all equipment which will be used: keypunch, verifier, sorter, collator, tabulator, central processor unit (CPU), input-output components (I/O), etc...

(B) Estimated number of hours and usage rates for each distinct piece of equipment proposed

(C) Listing of rates or quotes from prospective suppliers of the offeror

(D) Copies of invoices submitted by past suppliers of the offeror

(E) Listing of rates developed and/or approved by a Government agency where offeror has in-house capability

(v) If consultants are proposed, detailed data concerning proposed consultant costs should include the following:

(A) Names of consultant(s) to be engaged

(B) Daily fees to be paid to each consultant

(C) Estimated number of days of consulting services

(D) Consulting agreements entered into between consultant(s) and the offeror, or invoices submitted by consultant(s) for similar services previously provided to the offeror

(E) Rationale for acceptance of cost

(vi) If proposed, cost information for each

subcontractor shall be furnished in the same format and level of detail as prescribed for the prime offeror. Additionally, the offeror shall submit the following information:

(A) A description of the items to be furnished by the subcontractor

(B) Identification of the proposed subcontractor and an explanation of why and how the proposed subcontractor was selected including the extent of competition obtained

(C) The proposed subcontract price, the offeror's cost or price analysis thereof, and performance/delivery schedule

(D) Identification of the type of subcontract to be used

(vii) Offeror shall briefly describe organization policies in the following areas (published policies may be furnished):

(A) Salary increases to include:
(aa) merit
(bb) cost of living
(cc) general

(B) Travel/subsistence

(C) Consultant use and terms of agreements

(viii) Offerors lacking Government approved indirect cost rates must provide detailed background data indicating the cost elements included in the applicable pool and a statement that such treatment is in accordance with the established accounting practice. Offerors with established rate agreements with Federal cognizant agencies shall submit one copy of such agreement.

(ix) Offeror shall:

(A) Provide CPA certified balance sheet, profit/loss statement and statement of retained earnings covering each of the offeror's last three annual accounting periods.

(B) Specify the financial capacity, working capital and other resources available to perform the contract without assistance from any outside source.

(C) Provide the name, location and intercompany pricing policy for other divisions,

subsidiaries, parent company, or affiliated companies that will perform work or furnish materials under this contract.

(D) Provide an estimated cash flow. Each offeror is required to submit a schedule of proposed monthly costs for the planned duration of the project.

L.5 AMENDMENTS TO PROPOSALS (USDA 452.215-72) (JUL 1985)

Any changes to a proposal made by the offeror after its initial submittal shall be accomplished by replacement pages. Changes from the original page shall be indicated on the outside margin by vertical lines adjacent to the change. The offeror shall include the date of the amendment on the lower right corner of the changed pages.

L.6 SUBMISSION OF PROPOSALS (USDA 452.215-73) (JUL 1985)

All proposals shall be submitted in the formats and quantities specified below:

(a) Standard Form 33 - one (1) original and 1 copies

(b) Technical Proposal - 4 copies

(c) Cost/Price Proposal - 1 copies

L.7 TYPE OF CONTRACT (FAR 52.216-1) (APR 1984)

The Government contemplates award of a fixed price contract resulting from this solicitation.

L.8 SET-ASIDE/SIZE-STANDARD INFORMATION (USDA 452.219-70) (JUL 1985)

This solicitation includes the following set-aside and/or size standard criteria:

(a) Percent of the set-aside: 0%

(b) Type of set-aside: None

(c) Size standard or other criteria: No more than 3.5 million dollars average annual receipts for an offeror's preceeding 3 fiscal years.

(d) Standard Industrial Classification (SIC Code): 8999.

.9 SERVICE OF PROTEST (FAR 52.233-2) (JAN 1985)

Protests, as defined in Section 33.101 of the Federal Acquisition Regulation, shall be served on the Contracting Officer by obtaining written and dated acknowledgement of receipt from:

Thomas B. Hunnicutt

Hand-Carried Address:

USDA Forest Service
Southeastern Forest Experiment Station
200 Weaver Boulevard, Room 344
Asheville, NC 28804

Mailing Address:

USDA Forest Service
Southeastern Forest Experiment Station
P.O. Box 2680, 200 Weaver Boulevard
Asheville, NC 28802

SECTION M - EVALUATION FACTORS FOR AWARD

M.1 EVALUATION OF TECHNICAL PROPOSALS

Technical proposals will be evaluated and ranked by the Source Selection Panel without having knowledge of price offered. The following criteria will be considered in evaluating proposals.

EVALUATION CRITERIA

Note: Weight factors for subcriteria are shown in parentheses:

	MAXIMUM VALUE
2. Technical Approach	40
A demonstrated, comprehensive understanding of the basic objectives of this scope of work and the presentation of a concise, sound, cost-effective approach to achieve these objectives, including realistic timetable for scheduling the Planning Study.	
2. Personnel	30
Experience of the study director and staff in developing and conducting fund campaign planning studies; particularly for projects of similar subject and scope. Related experience in managing nationwide fund campaigns.	
3. Firm's Experience and Organization	30
Evidence of the firm's ability and experience (particularly recent) to complete clear, concise thorough, and useable planning studies; experience in completing fund campaign studies of similar subject and scope. Related experience in managing nationwide fund campaigns. The expertise and resources that the offeror has readily available to call upon in the completion of the contract.	
TOTAL MAXIMUM POINTS	100

M.2 METHOD OF AWARD

Award will be made to that offeror (1) whose proposal is technically acceptable, and (2) whose technical/cost relationship is the most advantageous to the Government. While cost is secondary to technical, it will be a factor in the award decision. The critical factor in making any cost/technical trade-off is not the spread between the technical scores, but rather what is the significance of that difference. The significance of the spread in scores will be

termined on the basis of what the difference might mean in terms of performance, and what it would cost the Government to take advantage of it. Award may not necessarily be made to that offeror submitting the lowest offer. Also, award may not necessarily be made for technical capabilities that would appear to exceed those needed for the successful performance of the work. The Government reserves the right to make cost/technical trade-offs that are in the best interest of the Government.

Award may be made without further negotiations. Proposals should be submitted initially on the most favorable terms, from a price and technical standpoint, which the offeror can submit to the Government. However, the Government may, after evaluation of proposals, conduct further oral or written discussions, as appropriate, with all offerors whose proposals are within a competitive range.

STATEMENT OF WORK

CRADLE OF FORESTRY CAPITAL FUND CAMPAIGN
PLANNING STUDY

I. Scope of contract:

The contract shall furnish the necessary personnel, materials, services, equipment, facilities, and otherwise perform all work necessary for and incidental to the performance of the work set forth in this statement of work.

II. General Description of Services:

The basic intent of this contract is to study the feasibility of a capital fund campaign for development of the Cradle of Forestry in America on the Pisgah National Forest. The contract shall include recommendations to the Forest Service on the strategy for implementing and managing a successful fund raising campaign and identify prospective donors to the campaign.

III. Background Information:

A. History: The Cradle of Forestry in America is a 6,540-acre National Historic Site commemorating the birthplace of scientific forestry and forestry education in America. Refer to the Cradle of Forestry in America Management Plan for a detailed description of existing and planned facilities.

B. History of Funding: Funding for the development and maintenance of existing facilities at the Cradle of Forestry has come from a diversity of sources. These include appropriated funds, Job Corps vocational skills training program, the Cradle of Forestry in America Interpretive Association, and donations from private citizens.

C. Funding Needs: The Cradle of Forestry in America Management Plan outlines the planned facilities for the Cradle. The estimated cost for completion of these facilities is $7 million. An immediate need of $300,000 for completing interpretive and educational exhibits for the new Visitor Orientation Center has been identified. Completion of the Visitor Orientation Center structure is scheduled for spring of 1988. Refer to the "Cost Estimate for Cradle of Forestry in America Management Plan" for a detailed cost estimate of planned facilities.

D. Capital Fund Campaign Committee:

1. The following individuals have indicated a willingness to co-chair a capital fund campaign committee:

Honorable James McClure Clarke, U. S. Congressman from North Carolina

William (Bill) Towell, former Executive Director of American Forestry Assoc. and former president of the Society of American Foresters.

2. Other possible committee members would be nationally prominent people such as elected state and national officials, former corporate Chief Executives, heads of federal agencies, and others who have exhibited leadership in the areas of forestry, wood products, environmental education, natural resource management and historic preservation.

E. Potential Donors to Capital Fund Campaign:

1. Corporations and foundations with a history of giving to projects involving forestry, environmental education, natural resource management, and historic preservation and interpretation.

2. Individuals with interests in woods products industry, environmental education, natural resource management.

IV. Detailed Description of Work.

The contractor shall perform the following services:

A. Determine the feasibility of the planned Capital Fund Campaign. Contractor shall design and implement a method for researching and collecting adequate information and facts to show the feasibility for the Capital Fund Campaign.

B. Define the appropriate campaign project structure. Contractor shall evaluate the USDA Forest Service, the Cradle of Forestry Interpretive Association and potential campaign committee volunteer members and recommend the appropriate organizational structure for implementing and managing a successful campaign.

C. Through independent research and interaction with the Forest Service, the contractor shall identify potential major donors appropriate for a successful Capital Fund Campaign. The research should include, but not be limitted to, the donors' history and scope of giving, their probability of supporting the Cradle of Forestry in America through their gift, and the most effective means of requesting a gift. The research should include key corporations, foundations, individuals, and other appropriate entities.

D. The contractor shall develop the material necessary to communicate the scope and value of the Cradle of Forestry project to potential donors.

E. The contractor shall prepare and implement a plan for making initial contacts, appointments, and arrangements for face-to-face interviews with major potential donors to evaluate the viability of the Cradle of Forestry project, the goal for the campaign, and interest in the project. These interviews are not for the purpose of soliciting funds.

F. The contractor shall provide a report which will include an analysis of the proposed Capital Fund Campaign, narrative summaries of interviews with

potential donors, and conclusions regarding each interview, recommendations for the Capital Fund Campaign organizational structure, and recommended strategy for implementing and managing a successful Capital Fund Campaign. The strengths and obstacles to be overcome for the campaign will be identified. An oral summary of the report shall be presented to Forest Service management with an opportunity for questions of clarification. Fifty printed copies of the complete report shall also be provided.